STATE OF NORTH DAKOTA

HUMAN RESOURCES MANUAL
FOR ACTIVE EMPLOYEES

PEOPLESOFT
VERSION 8.9

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Written by MAXIMUS-*ERP Solutions Group*, March 2003 and revised by OMB, October 2006.

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MANAGING POSITIONS

OVERVIEW

PeopleSoft Human Resources employs an integrated, table-driven design to help your organization keep an effective-dated history of all positions in your organization, regardless of whether they are filled. Therefore, you can track your organizational reporting relationships independently of the employees in the positions.

The State of North Dakota has chosen to use position management functionality. This requires that the position be properly configured prior to being associated with an employee. Position management allows you to set up all the position data in advance. That way, when you hire an employee, all you do is assign them to a position, and the system uses the position information to fill out much of the job data record. This saves time and reduces errors for those involved in the hiring process.

OBJECTIVES

At the completion of this section, you will be able to:

1. Create a New Position

2. Update Position Info To:

    - Update a position
    - Reclassify a position
    - Inactivate a position

CREATING POSITIONS

OVERVIEW

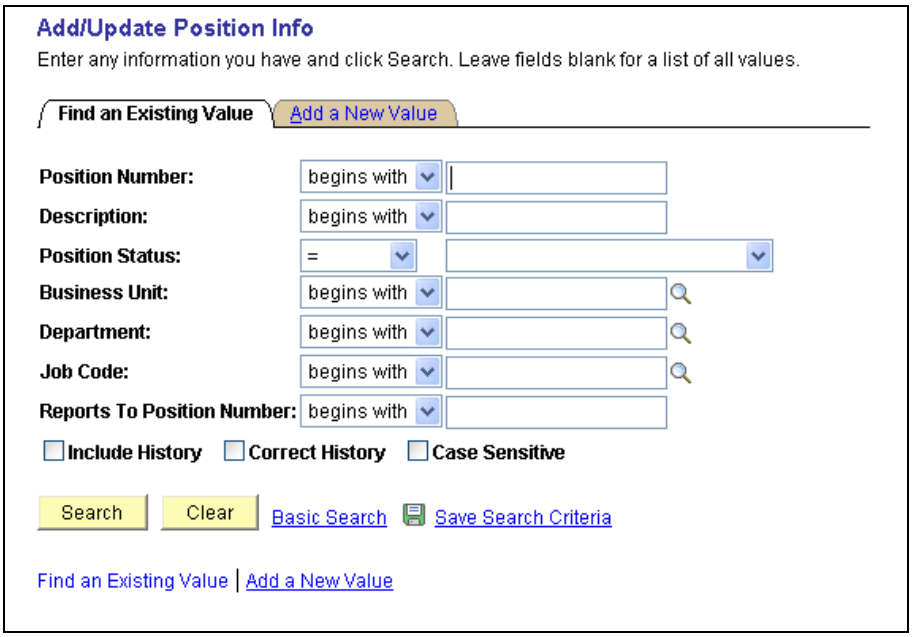
The Add/Update Position Info pages are where positions are defined. You will create and maintain position information on these pages. After you've assigned employees to the positions, this is also where you will update data that affects both positions and incumbents.

The Add/Update Position Info component contains three pages. The following table lists the pages and describes the required actions you need to take on each page to create a new position.

Page	Actions Taken
Description	**Position Information**: Enter **Effective Date**, **Status** (*Active* or *Inactive*), **Reason, Position Status** (*Approved*, *Frozen*, or *Proposed*), and **Status Date**. **Job Information**: Enter **Business Unit, Job Code, Reg/Temp,** and **Full/Part Time.** **Work Location: Company** (ND), **Department** and **Location** **FLSA Status**
Specific Information	Check the **Update Incumbents, Include Salary Plan Grade** and **Budgeted Position** checkboxes. **Education and Government**: Enter **FTE,** check if **Adds to FTE Actual Count**
Budget and Incumbents	No action required. Displays current incumbent and current budget information.

CREATING A NEW POSITION

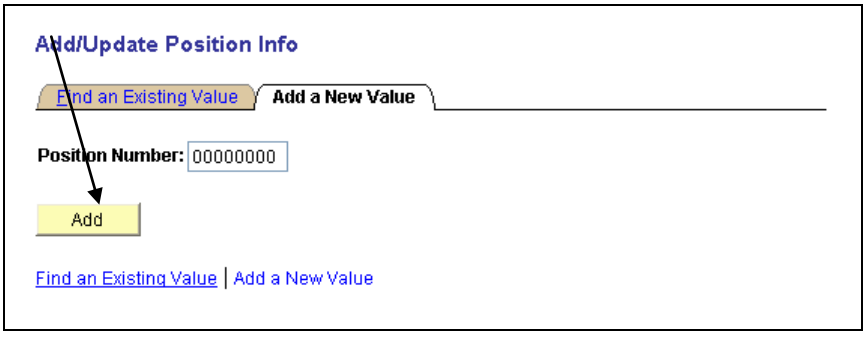
To begin the process of creating a new position, use the following navigational path**: Main Menu > Organizational Development > Position Management > Maintain Positions Budgets > Add/Update Position Info**. The following page will appear.

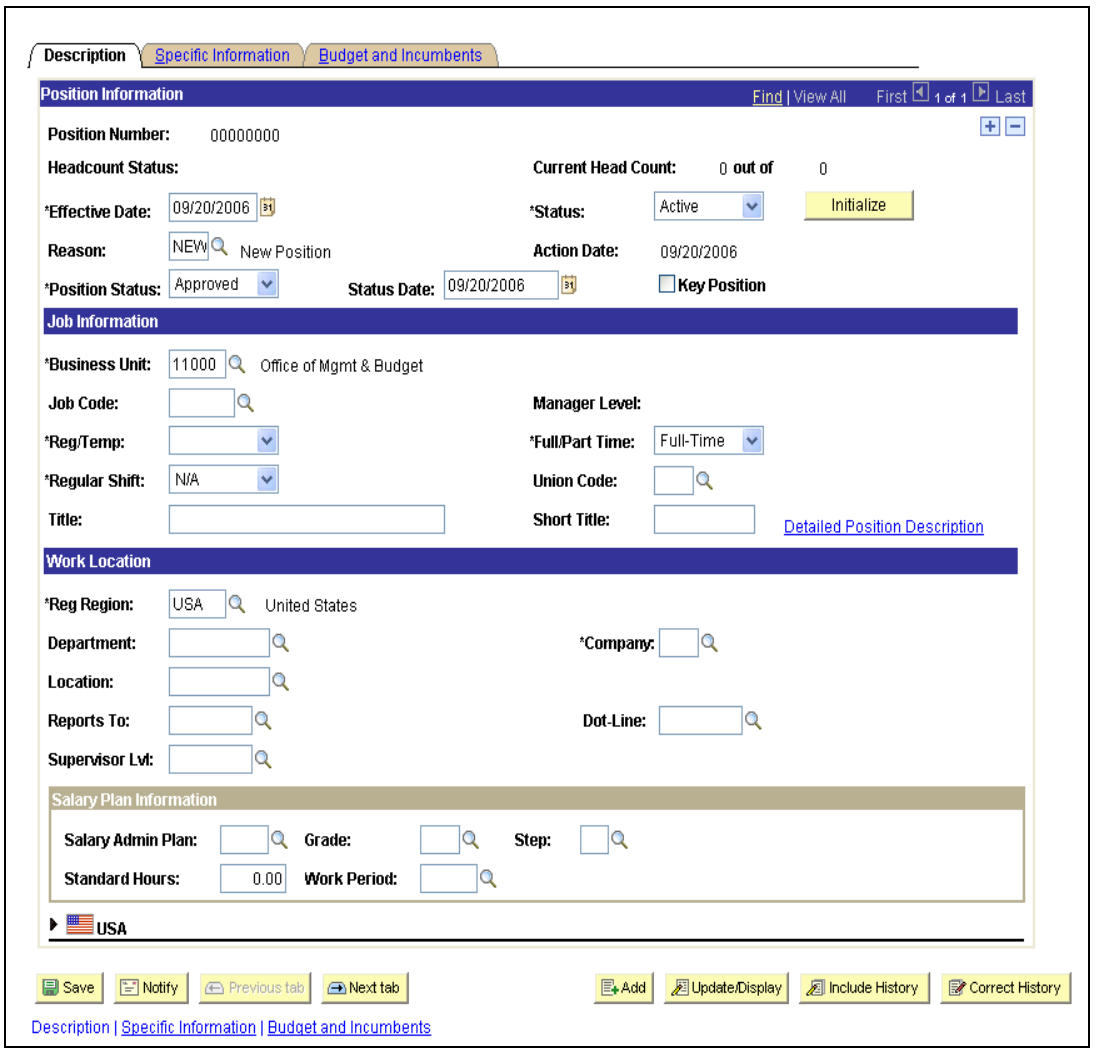


Note: This will be the initial page you will see for all position management transactions.

To create a new position, click on the Add a New Value hyperlink. The following page will appear.

Click on Add – **the system will assign a position number**.





DESCRIPTION PAGE

Position Information:

Effective Date – Identifies the date the position becomes effective. The system defaults in the system date (current date). Enter the date the new position will become effective.

Status – Indicates whether the status of the position is *Active* or *Inactive*. Select one of these values from the drop down selections by clicking .

Reason – Rationale for creating the new position. Since a new position is being created, the system defaults to *NEW*.

Position Status – Indicates whether the position is *Approved*, *Frozen*, or *Proposed*. Select one of these values from the drop down selections by clicking .

Status Date – Displays the date that a position first held a particular status value. Since this is a new position, the **Status Date** will be the same as the **Effective Date**. The system defaults the **Effective Date** in this field.

Job Information:

Business Unit – Will default to your Agency's BU.

Job Code – Enter the job code that this position is associated with, or select from the lookup page by clicking .

Once the **Job Code** information is entered, the following fields default from the Job Code table:

- **Reg/Temp** – Indicates whether this is a regular position or a temporary position.
- **Full/Part** – Indicates whether the position is full or part time.
- **Regular Shift –** Not currently used.
- **Union Code –** Not currently used.

Title - Defaults from the Job Code table.

Short Title - Defaults from the Job Code table.

Note: When the **Job Code** information is entered, the appropriate values for the **Title** and **Short Title** fields on the **Job Information** section default.

Work Location:

Regulatory Region – Defaults to *USA*.

Company – Enter *ND* for State of North Dakota.

Department – Enter the appropriate department code or select from the Lookup page by clicking .

Location Code – The location value may default after you have entered the **Department** field information. The location code identifies the physical location where the person who will occupy this position will work. Verify that the location code is correct or change if necessary.

Reports To - Not currently used.

Dot-Line - Not currently used.

Supervisor Lvl - Not currently used.

Salary Plan Information:

Salary Admin Plan, Grade, Standard Hours, Work Period – Indicates the salary components and hours for this position.

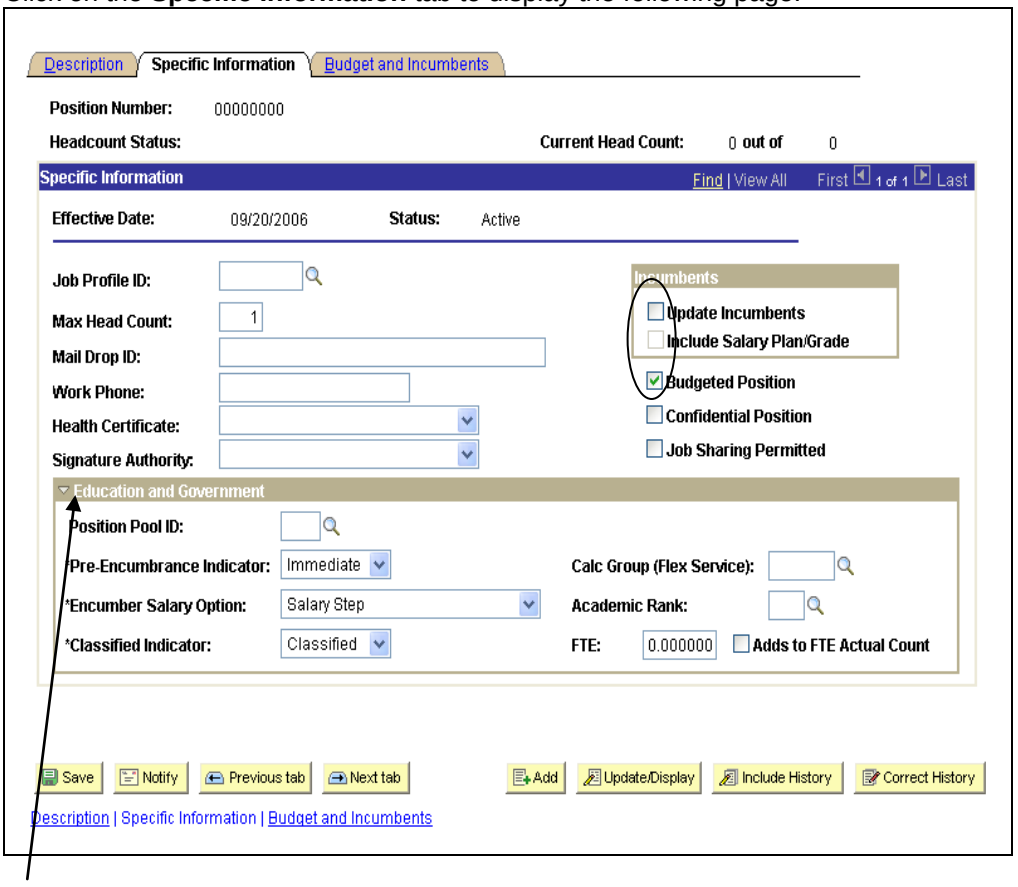
FLSA Status – Open the

and the following page will appear:

FLSA Status – Choose the appropriate class from the drop down.

Bargaining Unit – Not currently used.

Click on the **Specific Information** tab to display the following page.



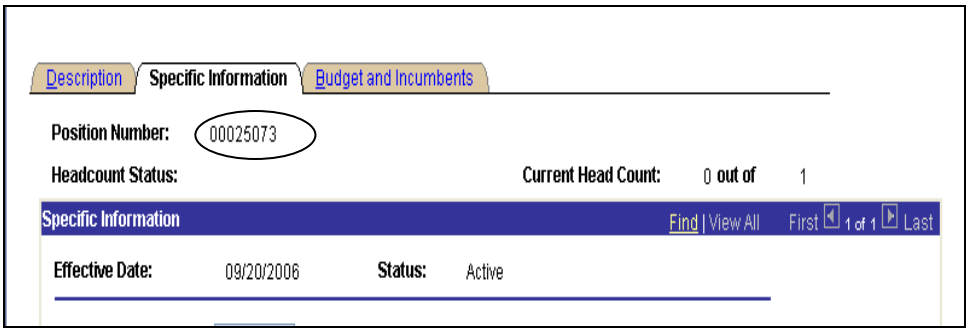
Need to Open Education and Government Section to view.

SPECIFIC INFORMATION PAGE

Ensure that the **Budgeted Position** checkbox is checked and the **Update Incumbents** checkbox is unchecked. The **Update Incumbents** checkbox should be unchecked since this is a new position and contains no incumbents.

Click Save to save the new position in the system.

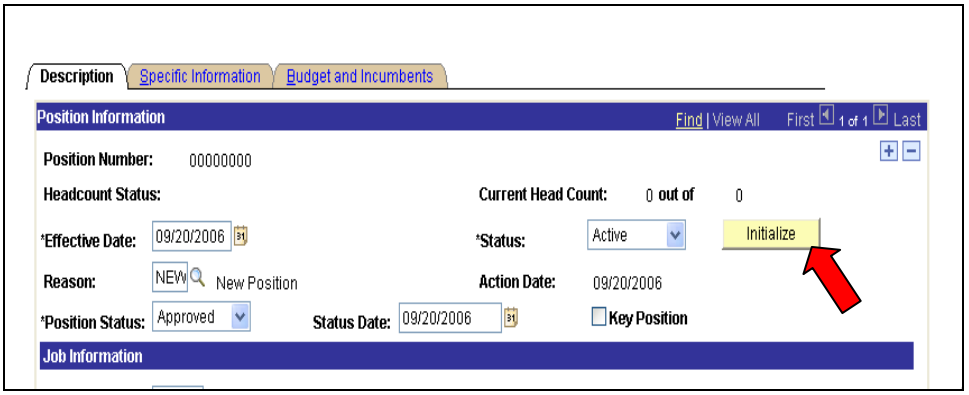
The Position Number field will be populated with the number that is assigned by the system.



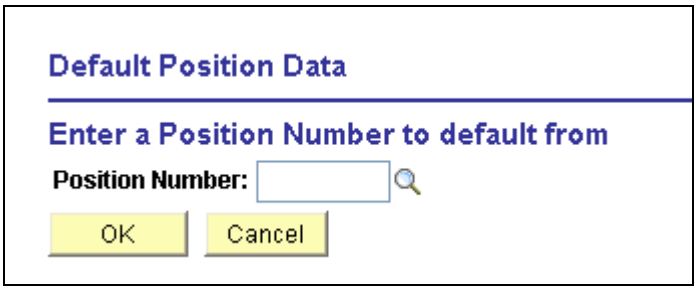
COPYING FROM AN EXISTING POSITION

If you are creating a position that is similar to a position that already exists, you can copy existing position information into the new position.

To do this, add a position (as described previously) until you arrive at the **Position Information - Description** tab (shown below). On the **Description** page, you will see an Initialize button (indicated by the arrow).



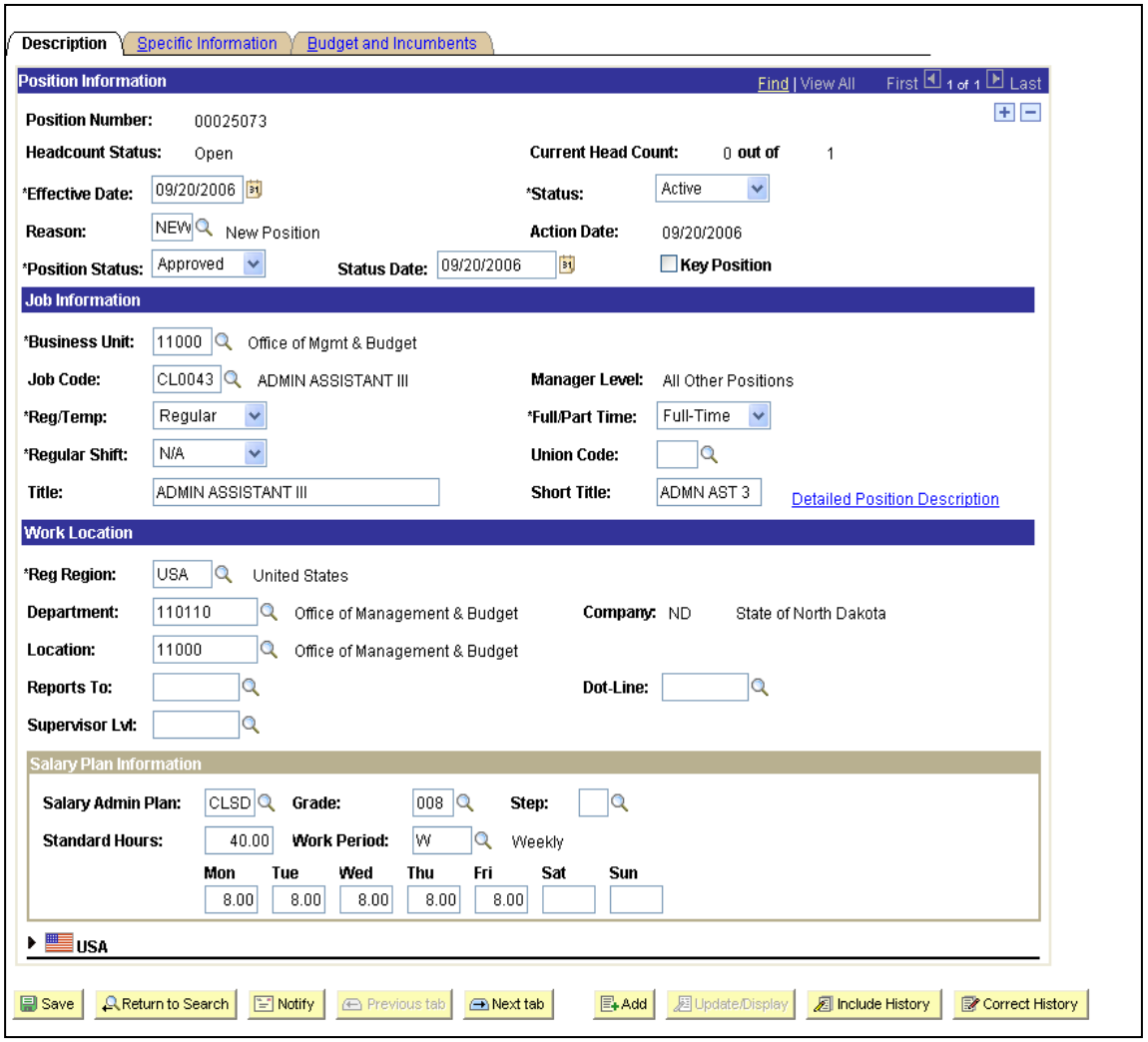
Click on the Initialize button and the following page will appear:



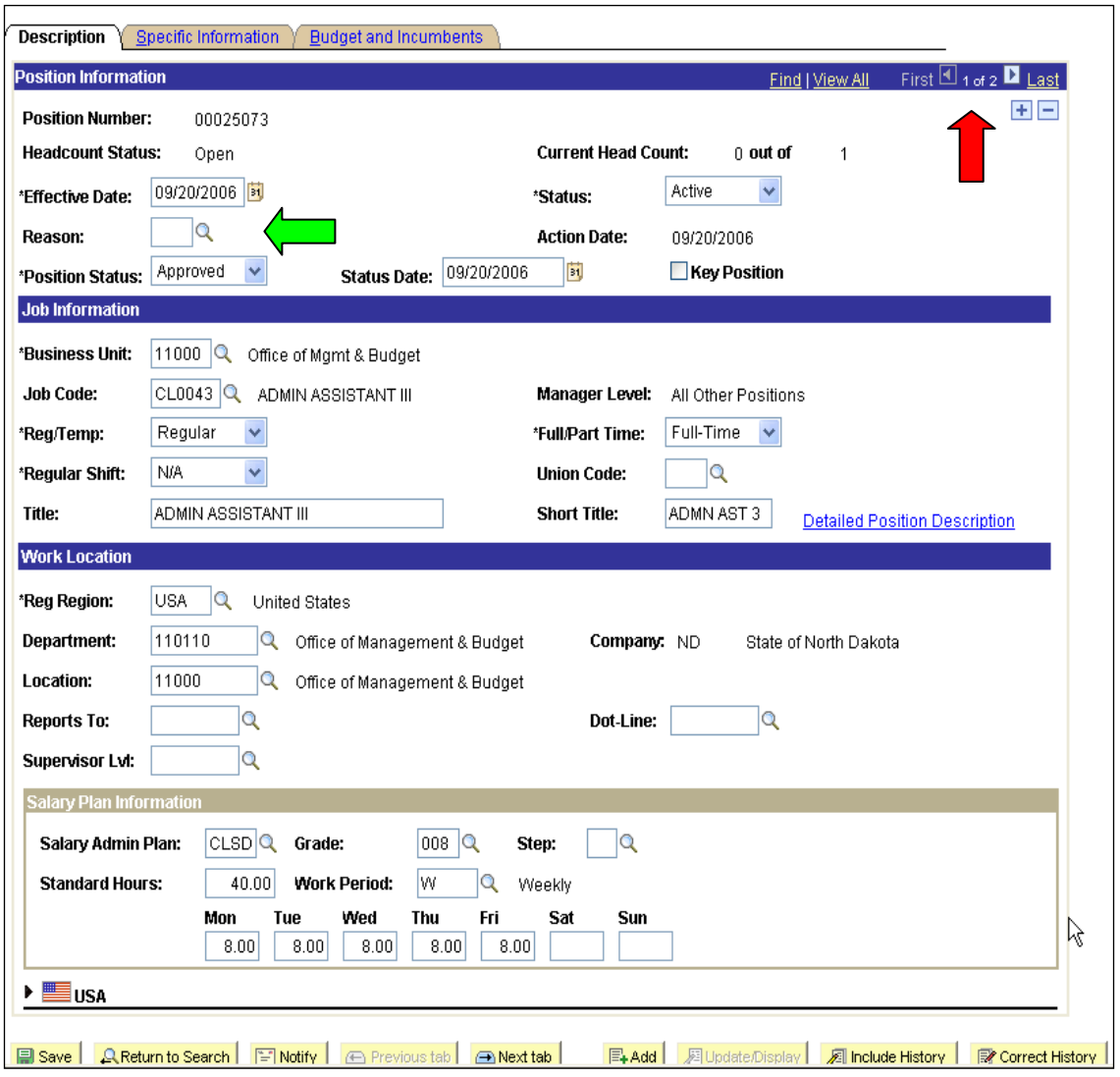
Enter the position number you want to copy from into the **Position Number** field and click OK. The system automatically populates the position data components with the information from the position you have selected. Continue to add the position as described previously.

UPDATING POSITION DATA

To begin using the Position Information pages, use the following navigation path: **Main Menu > Organizational Development > Position Management > Maintain Positions Budgets > Add/Update Position Info**. The search page to find an existing position value will appear as described previously. Once you have selected the position number you wish to work with, the following page will appear.



Insert a new data row by clicking the + sign across from the **Position Number** field. After you click +, a new data row will appear. Use this row to enter updated information for this position. An example is shown below.



Notice, as indicated by the arrow on the right that you are now looking at 1 of 2 data rows. Also, as depicted by the arrow on the left, the **Reason** field is now blank.

The **Effective Date** field defaults to the current date (system date). Enter the date that the new position information is to take effect.

The following scenarios begin with the assumption you have already selected the position, inserted a new data row, and entered the appropriate effective date.

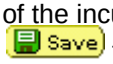
Note: The same Position Data pages that were used to add positions will be used in the following scenarios to update position information.

ACTION 1: UPDATE A POSITION

1. Verify or change the value in the **Status** field.
2. Enter the appropriate information in the **Reason** field or select a reason by clicking and using the Lookup page.
3. Verify or change the value in the **Position Status** field and **Status Date** field.
4. Verify that **Business Unit** is correct.
5. Enter the new job code in the **Job Code** field if appropriate. As is the case with adding new positions, the following fields default when the **Job Code** field is populated:
   - **Reg/Temp**
   - **Full/Part Time**
   - **Title and Short Title**
   - **Salary Admin Plan, Grade, Standard Hours,** and **Work Period**
6. Enter the new department information in the **Department** field if appropriate.
7. Enter the new work location information in the **Location** field if appropriate.
8. Open USA Flag, enter in **FLSA Status**.
9. Click on the **Specific Information** tab.
10. Click on the **Update Incumbents** box if you want the incumbent to be updated with the changes you made. Depending on the reason for the update, incumbents may, or may not, need to be updated. **Update Incumbents** automatically updates any changes made to the position directly to the job record of the person(s) assigned to the position.
11. Click on the **Include Salary Plan/Grade** box. This will automatically update the Grade on the incumbents record in Job Data.
12. Verify that the **Budgeted Position** box is checked.
13. Open **Education and Government** section, verify or change FTE.
14. Click on

to save the position data changes.

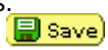
ACTION 2: RECLASSIFICATION / JOB CODE CHANGE

1. Verify or change the value in the **Status** field.
2. Enter the appropriate information in the **Reason** field or select a reason by clicking and using the Lookup page.
3. Verify or change the value in the **Position Status** field and **Status Date** field.
4. Verify that **Business Unit** is correct.
5. Enter the new job code in the **Job Code** field if appropriate. As is the case with adding new positions, the following fields default when the **Job Code** field is populated:
   - **Reg/Temp**
   - **Full/Part Time**
   - **Title and Short Title**
   - **Salary Admin Plan, Grade, Standard Hours,** and **Work Period**
6. Enter the new department information in the **Department** field, if appropriate.
7. Enter the new work location information in the **Location** field, if appropriate.
8. Open USA Flag, enter in **FLSA Status**.
9. Click on the **Specific Information** tab.
10. Click on the **Update Incumbents** box if you want the incumbent to be updated with the changes you made. Depending on the reason for the update, incumbents may, or may not, need to be updated. **Update Incumbents** automatically updates any changes made to the position directly to the job record of the person(s) assigned to the position.
11. Click on the **Include Salary Plan/Grade** box. This will automatically update the Grade on the incumbents record in Job Data.
12. Verify that the **Budgeted Position** box is checked.
13. Open **Education and Government** section, verify or change FTE.
14. Click on the **Budget and Incumbents** tab. Note the employee ID number of the incumbent.
15. Click on 

to save the position data changes.

ACTION 3: TRANSFER POSITION

1. Verify or change the value in the **Status** field.
2. Enter the appropriate information in the **Reason** field or select a reason by clicking and using the Lookup page.
3. Verify or change the value in the **Position Status** field and **Status Date** field.
4. Enter new department information in the **Department** field if necessary.
5. Enter the new work location information in the **Location** field if necessary.
6. Verify that **Business Unit** and **Department** are correct.
7. Enter the new job code in the **Job Code** field. As is the case with adding new positions, the following information defaults on the page when the **Job Code** field is populated:
   - **Reg / Temp**
   - **Full / Part Time**
   - **Salary Admin Plan**, **Grade**, **Standard Hours**, and **Work Period**
8. Click on the **Specific Information** tab.
9. Click on (or ensure) that the **Update Incumbents** box is checked.
10. Click on the **Include Salary Plan/Grade** box. This will automatically update the Grade on the incumbents record in Job Data.
11. Click on

.
12. If there is an incumbent in the position navigate to the **Job Data** pages by clicking ***Main Menu*** then using the following navigational path**: Workforce Administration > Job Information >** ***Job Data***. Review, if changes need to be made add a row and make necessary changes.
13. Click on 

to save your **Job Data** changes and complete the process.

HIRING AN EMPLOYEE

OVERVIEW

Essential employee data must be entered into the system before managing any human resource activity for employees. Once entered, you can input additional employee data and track a complete work history for each employee.

Many of the pages you will use when you hire an employee are the same pages you will use later to update information on existing employees.

The following is a summary of the components that are used during the hiring process. Most required fields *are preceded by an asterisk* in the system and must be filled in before saving the component.

To hire an employee you will progress through the **Personal Data**, **Job Data**, **Employment Data, Earnings Distribution**, and **Benefits Program Participation** pages. ***DO NOT save your data until you have completed the full hire process – through the benefits program participation***.

You will then enter emergency contact, driver's license, worker's compensation and designated medical provider information. ***You will save your data after each component***.

The following tables describe the components of the hire process.

Page Name	Page Description

Personal Information

Name	Add or view name, date of birth, gender, highest education level, marital status, social security number.
Contact Information	Add or view address detail, phone numbers, and Email.
Regional	Regulatory region, ethnic group, military status, and citizenship proof.
Organizational Relationships	Employee, Contingent Worker or Person of Interest.

Job Data

Work Location	Payroll status, action / reason codes, job indicator, position number, company, business unit, department, and location.
Job Information	Job code, regular/temporary, full/part time, standard hours, FTE, work period, FLSA status, and work day hours.
Payroll	Pay group, holiday schedule, employee type, tax location code, and FICA status.
Salary Plan	Salary administration plan, grade, and grade entry date.
Compensation	Compensation rate frequency, rate code, and comp rate.

Employment Data

Organizational Instance	Original start date, last start date, first start date, termination date, org. instance service date.
Organizational Assignment Data	Last assignment start date, first assignment start date, assignment end date, company seniority date, benefits service date, seniority pay calc date, probation date, professional experience date, last verification date business title, and position phone.

Earnings Distribution

Job Earnings Distribution	Identifies job earnings distribution, earnings type, earnings code, and distribution percent.

Benefits Program Participation

Benefit Program Participation	Identifies the benefit program and the effective date.

Workers Compensation

Worker's Compensation	Identifies worker's compensation code and percent.

Designated Medical Provider

Designated Medical Provider	Identifies employees preferred Designated Medical Provider

Emergency Contact

Emergency Contact	Designates an emergency contact for the employee that includes the contact name, relationship, address, and phone numbers.

Driver's License

Driver's License	Applicable for positions that operate motor vehicles. Includes the following information: driver's license number, state, issue location, issuing authority, valid from / to dates, number of violations and points, and the license type.

OBJECTIVES

At the completion of this section you will be able to hire an employee into the system by entering the following information:

- Personal data such as name, address, phone numbers, educational information, and social security number.
- Job data that includes the position, work location, and compensation.
- Earnings distribution information.
- Benefit program participation information.
- Worker's compensation information.
- Designated Medical Provider information.
- Emergency contact information.
- Driver's license information.

PREPARATION FOR HIRING AN EMPLOYEE

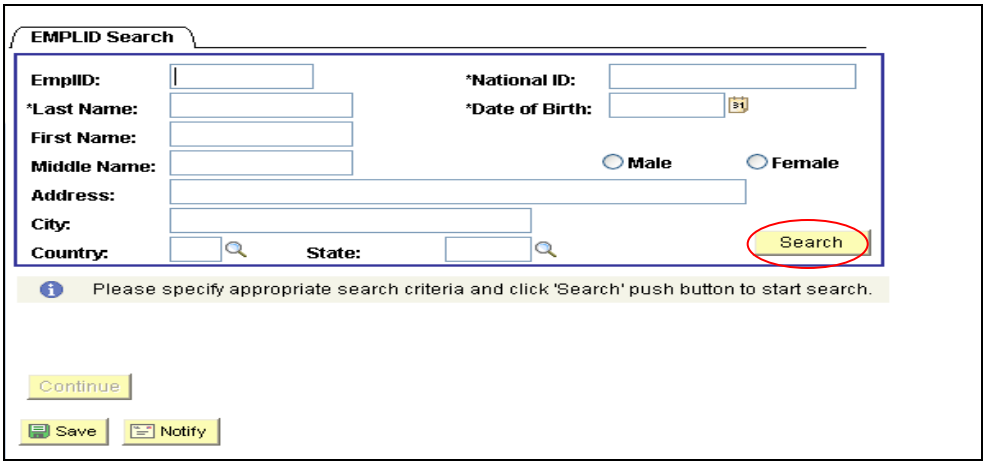
VERIFICATION OF POSITION INFORMATION

Since North Dakota is using position management functionality within PeopleSoft, it is imperative that all position data is correct. The hiring of a new employee is a good time to verify that the job information (department, job title, etc.) associated with a particular position is correct. To do this, see the Managing Positions Section of the manual.

NDHIRE

To begin the hiring process, navigate to the ND Hire page by using the following navigational path: **Main Menu > Workforce Administration > Personal Information > ND Hire.**

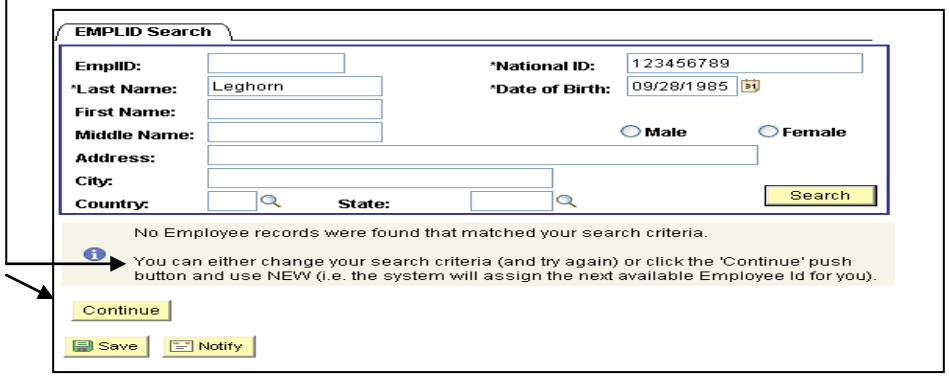
The system will display the following:



Enter information for the new employee in the “ND Hire” screen. Last Name, National ID, and Date of Birth are required fields. (The ND Hire process matches one of the following or both: National ID **or** the Last Name and Date of Birth.) Click search.

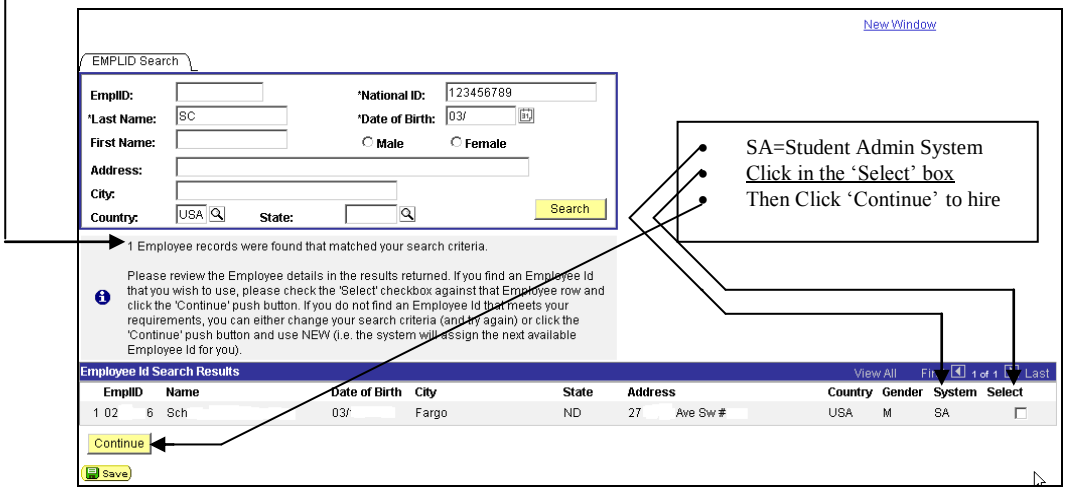
You will get one of the following three results:

1) If no records are found (see below), click on Continue for the hire process.

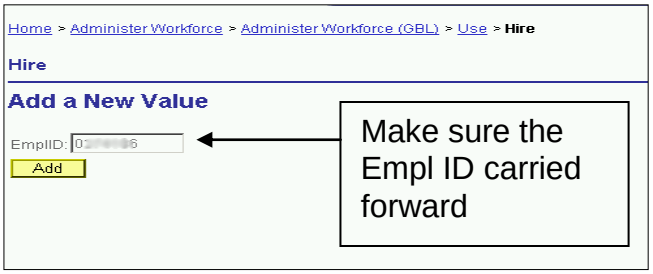


This will take you to the Biographical Details screen.

2) If a matching record is found in the Student Admin (SA) System and **ONLY** the SA (System), you may then select the correct matching record and click 'Continue' to proceed through the hire process.

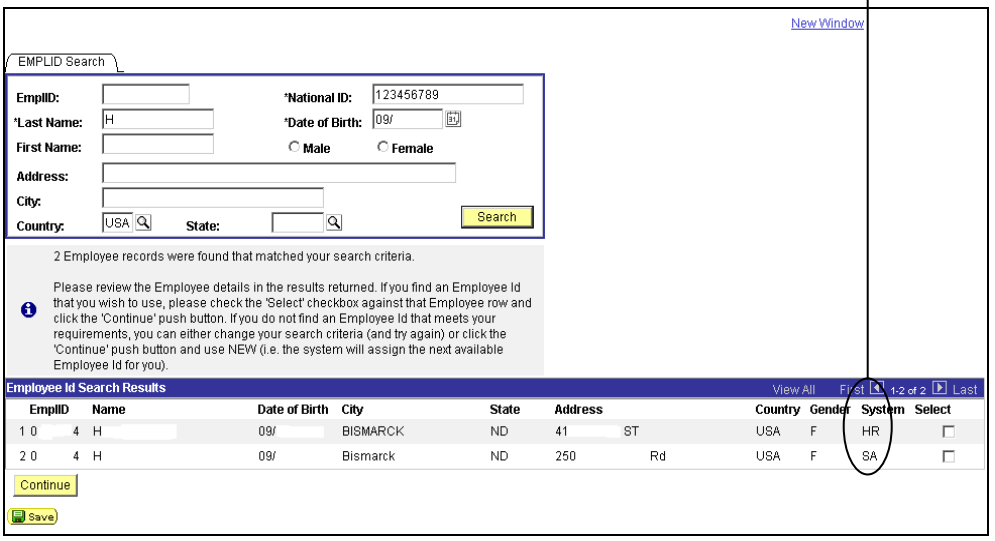


The following screen shall appear:



The employee id is brought in from the student administration system. You may click on add and proceed through the hire process.

3) Finally, if a matching record is found in the HR database (or both HR & SA as below), it will be necessary to switch to a Transfer, Re-Hire or Add Employment Instance process.

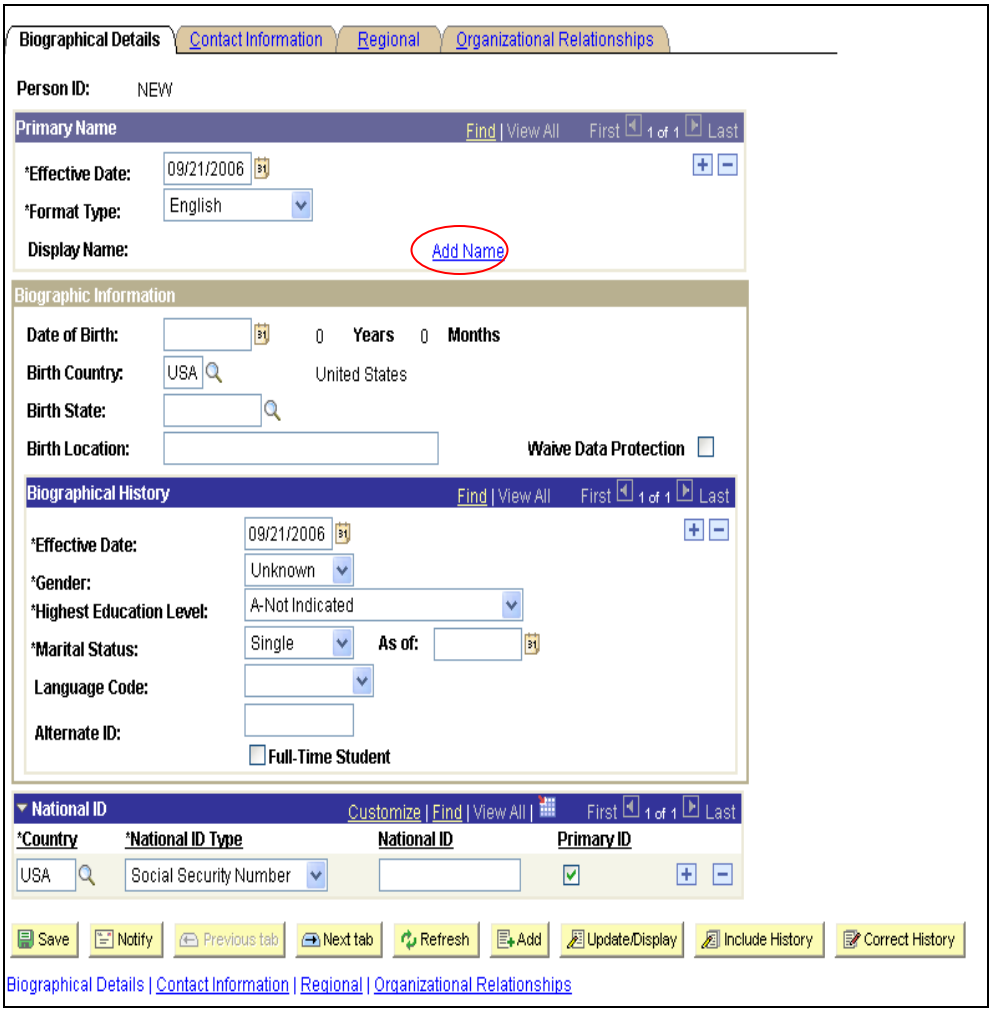


For rehires, transfers, refer to the Maintaining Employee Information section of this manual and/or the appropriate checklists.

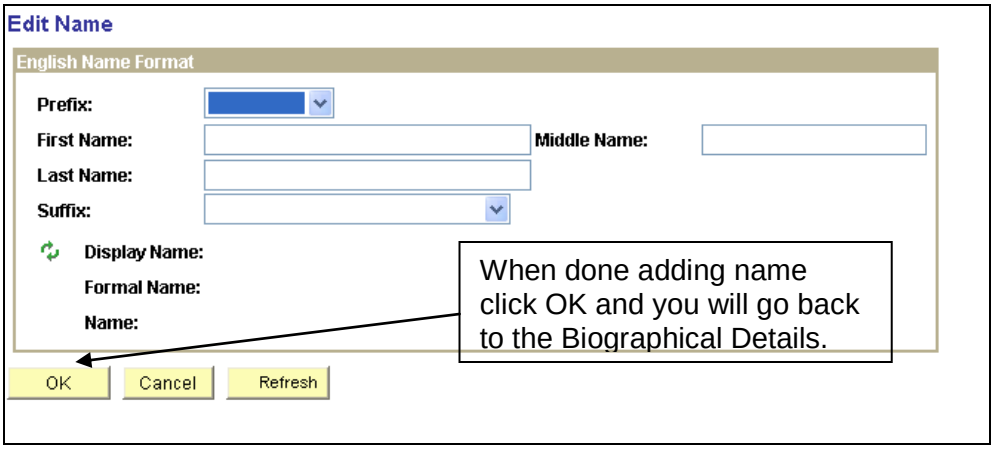
PERSONAL INFORMATION

The Personal Information pages are used to record and access personal information about employees. The Personal Information pages include the following: **Biographical Details, Contact Information, Regional** and **Organizational Relationships**. Many components and processes elsewhere within PeopleSoft reference the data stored on the Personal Information pages.

The **Biographical Details** page will appear as shown below.



Click on Add Name, this page will appear.



PRIMARY NAME

Note: Use mixed case for all data entries. The PeopleSoft system is case sensitive.

Person ID – This is the employee identification number assigned by PeopleSoft. The ID number will appear as *NEW* as you begin the hiring process. This will change after you complete the Biographical Details and click on Add a Relationship.

Effective Date – Enter the employee's hire date. This defaults to the current date. If the hire date is a date other than the default date, you can change it appropriately.

Format Type – Defaults to *English***.**

Add Name – Click on this.

Prefix – Click on the to choose a pre-defined prefix title. Options include *Dr*, *Miss*., *Mr*., *Mrs*., *Ms*..

First Name, Middle Name and **Last Name** – Enter the employee's name in the fields. (Mixed case)

Suffix – Click on the to choose a pre-defined suffix from the Lookup page. Options include *Jr*., *Sr*., etc.

Click OK – return to Biographical Details

Note: PeopleSoft enters the employee's name in the **Name** field after **First Name, Middle Initial** and **Last Name** have been entered. PeopleSoft only requires that a first and last name be entered. Prefix, middle name or initial, and suffix is optional.

Date of Birth – Enter the employee's date of birth. The system references this field for certain calculations in the Base Benefits and

Payroll modules. Once you enter a birth date, the system calculates the person's age in years and months.

The **Birth Country, Birth State,** and **Birth Location** are for information only and should be filled in, if known.

BIOGRAPHICAL HISTORY:

Effective Date: This defaults to the current date. Enter the employees hire date. If the hire date is a date other than the default date, you can change it appropriately.

Gender – The field defaults to *Unknown*. Click the to select either *Male* or *Female*.

The **Highest Education Level** field is mandatory. Select the appropriate option from the drop down list.

Marital Status - This field is for the employee's actual marital status (not their tax status).

As of – If known you may complete.

Language Code: Not currently being used. It is the employee's native or preferred language.

Alternate Employee ID: Not currently being used. This field is to record a second type of ID for an employee, Do NOT put the SSN in here.

Full Time Student: Informational only.

NATIONAL ID:

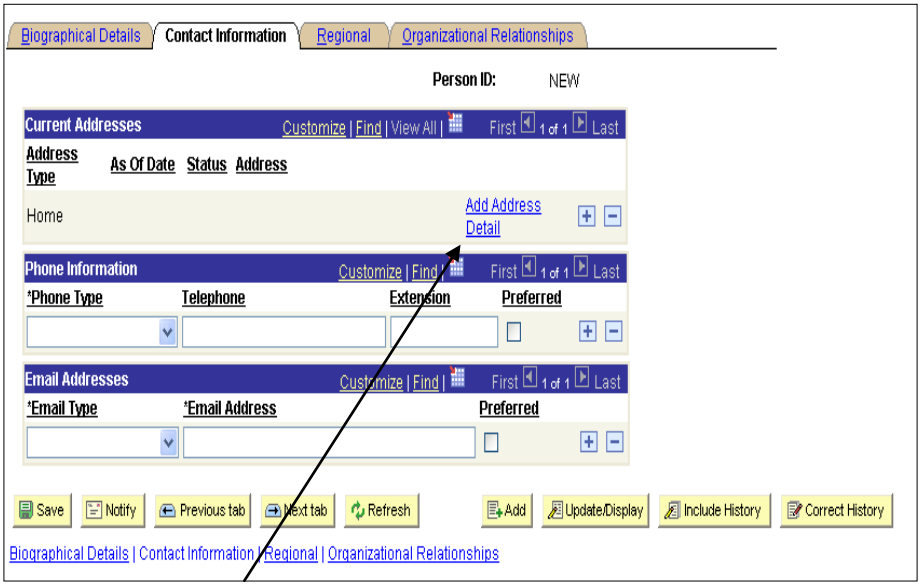
Country – Defaults to *USA*.

National ID Type Description – Defaults to *Social Security Number*.

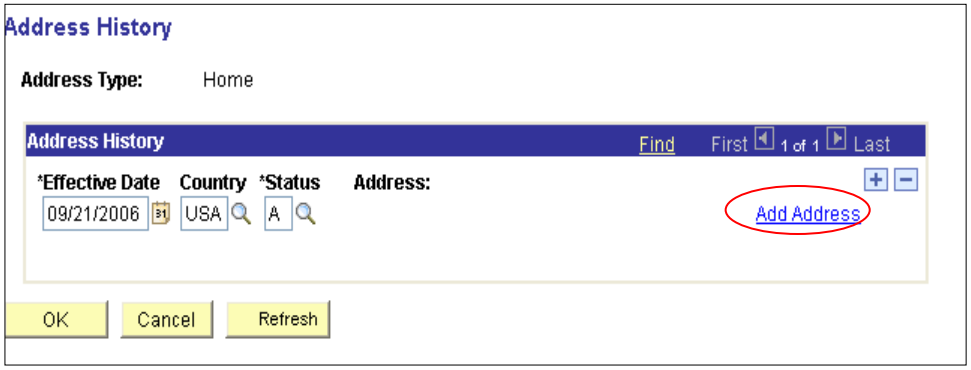
National ID (Social Security Number) – Enter the Social Security Number. It is not necessary to include punctuation; the number is formatted by the system.

Primary ID – Defaults to checked.

Click on **Contact Information** and the following screen will appear:



Click on Add Address Detail and the following screen will appear:

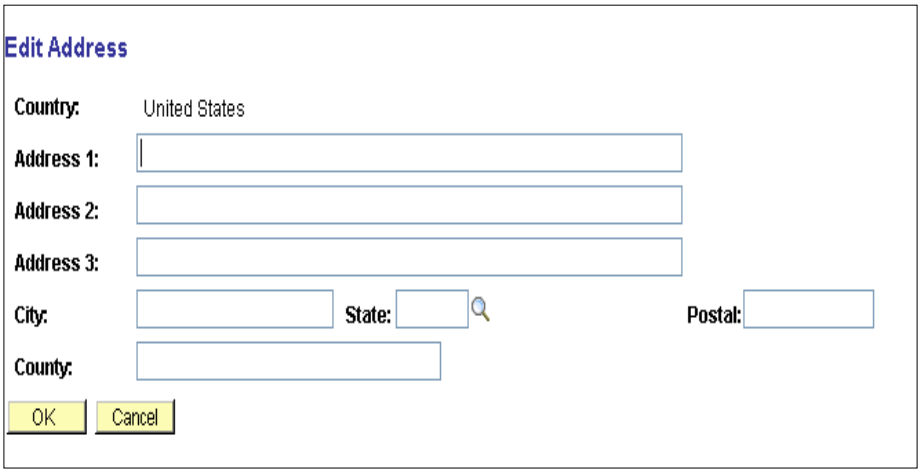


Address Type – The system defaults to Home address. Record the employee's home address. The system uses the home address stored here when printing all correspondence (e.g. Paychecks, Mailing Labels, etc.). Each employee must have a home address. The mailing address may be entered here by inserting a row. However, if the employee wants their check mailed to a different address than their home address, entering a mailing address here does not override the home address. You must indicate the check address in Payroll Options.

Country – Defaults to *USA*.

Status – Defaults to A (Active)

Click on **Add Address** and the following screen will appear:



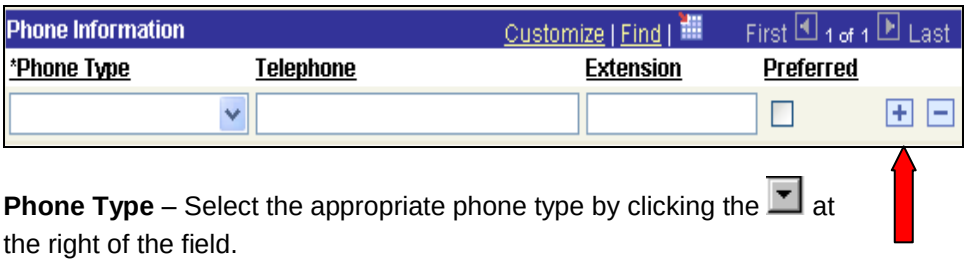
Address 1 – Enter the employee's street address.

The **Address 2** and **Address 3** fields are optional. These fields may be used to store additional address data (e.g. Apartment Number, or "Care Of…" notations).

City, State, Postal and **County –** Enter information as appropriate. The **Postal** field is used for the employee's zip code.

Click OK and OK, this will take you back to **Contact Information**.

To enter phone numbers, go down to the **Phone Information** section.



Phone Type – Select the appropriate phone type by clicking the at the right of the field.

Business – This is the employees work telephone number. This is the information that is pulled into the LDRPS file.

Telephone – Enter the phone number. The system automatically formats the number; the phone format is populated by default with 000/000-0000.

To enter additional phone numbers, click on the (as indicated by the arrow in the above screen shot).

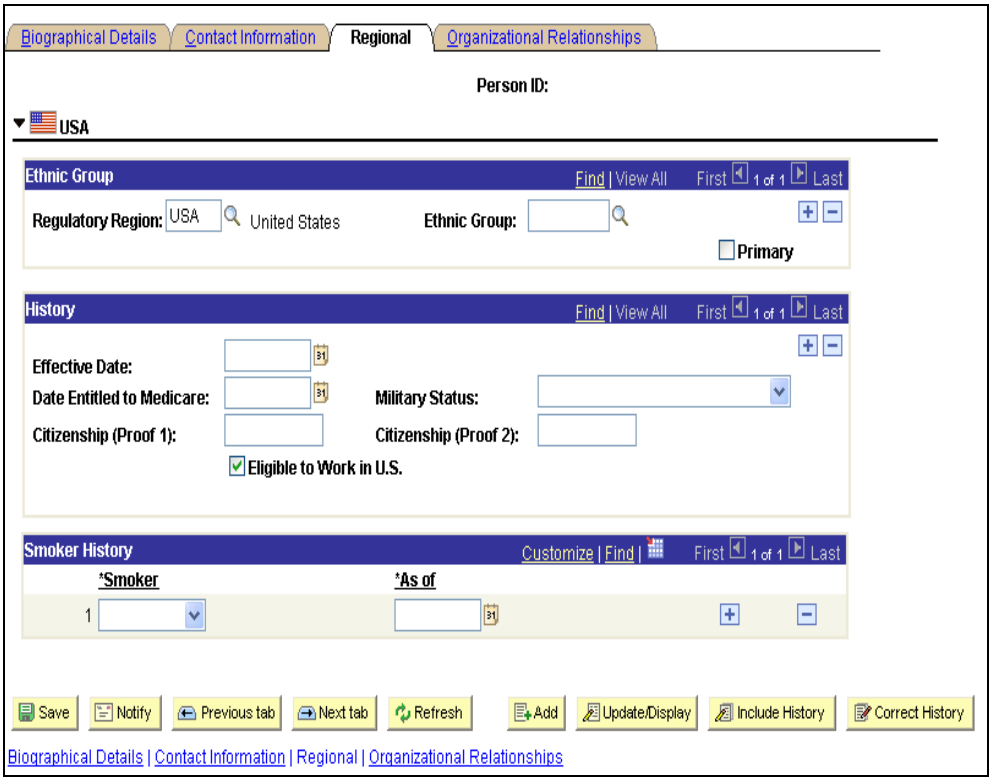
If you wish to enter an email address, go down to the **Email Addresses** section.

Email Type – Select the appropriate value from the available options by clicking the at the right of the field.

Email Address – Enter the appropriate email address.

To enter additional email addresses, click on the .

Click the **Regional** tab and the following page will be displayed.



USA:

Regulatory Region – Defaults to USA.

Ethnic Group – Choose the appropriate option from the drop down list.

Effective Date – Date of hire.

Date Entitled to Medicare - Not currently being used.

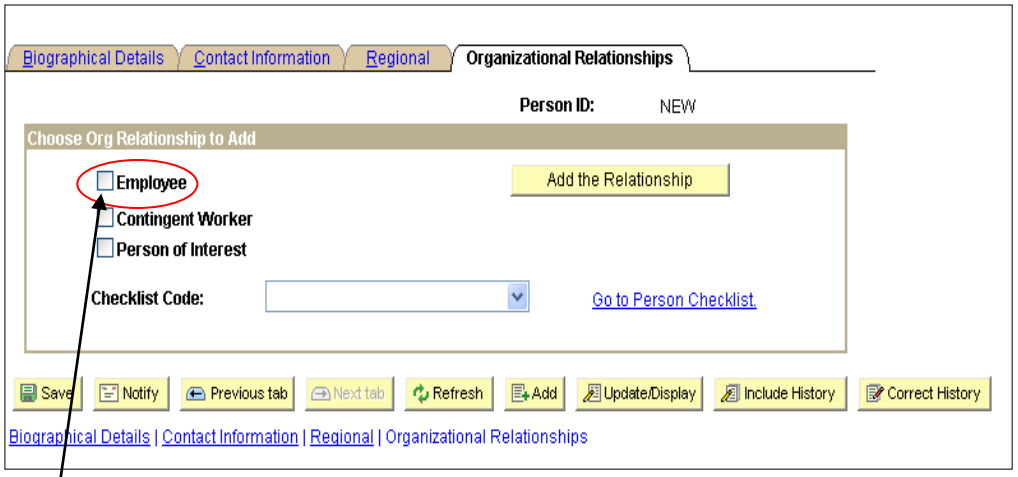
Military Status - Select appropriate option from the drop down list.

Citizenship Proof 1 and Citizenship Proof 2 - Record forms of identification to prove employee's eligibility to work in the US (I-9 form).

Eligible to Work in US – Default is checked.

Smoker: Informational only.

Click on **Organizational Relationships** and the screen below will appear:



Check the box by Employee

Click on **Add the Relationship** button – This will take you to the Work Location Screen. **Note: At this time you will have the ID number for your new employee.**

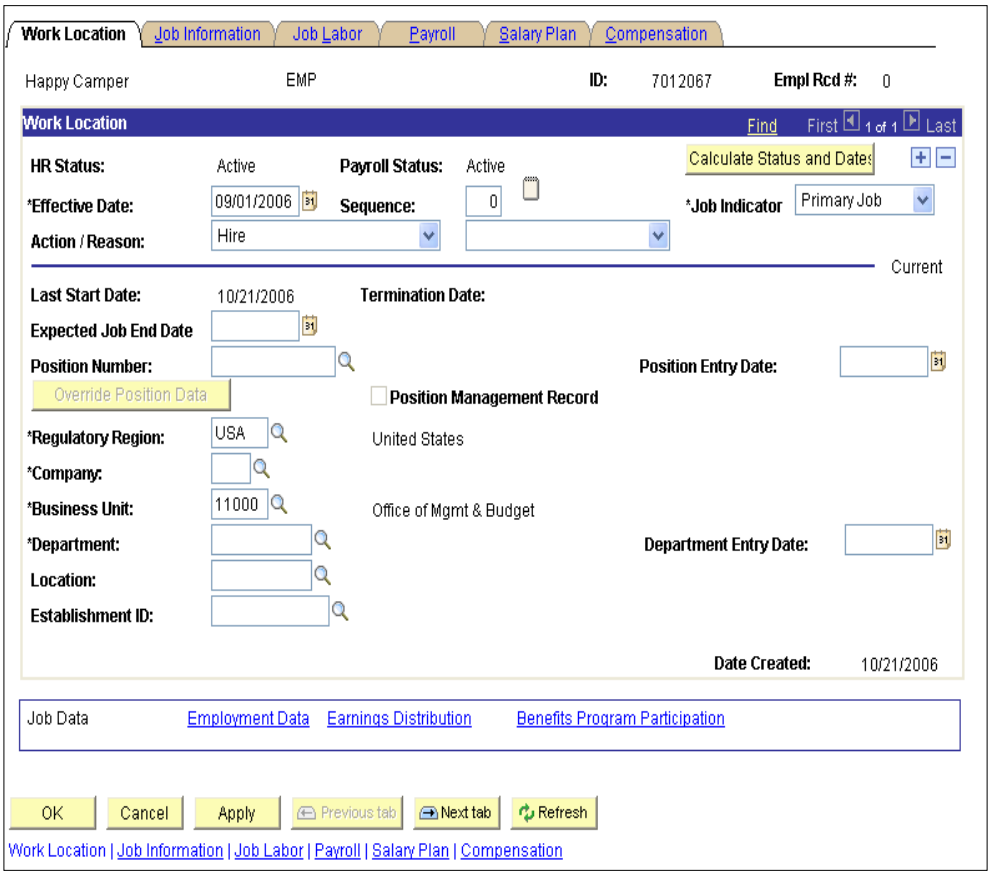
JOB DATA

After you have entered the employee's biographical information, the next step is to enter the job information.

The Job Data pages are used to record and access core information about the employee's job. These pages are the equivalent of an electronic personnel file. A history of the events, which occur during employment, (e.g. Promotions, Transfers, Terminations, etc.) are stored in Job Data.

The system displays the employee's name, Employee ID, and the employment record number, based on the information that you entered on the **Biographical Details** page.

Once you click the Add the Relationship button, the **Work Location** page will be displayed.



WORK LOCATION PAGE

Effective Date –The effective date defaults from the **Personal Information** pages.

Effective Sequence – For the new hire row this value will always default to *0* (zero).

Job Indicator – This defaults to *Primary* for new hires.

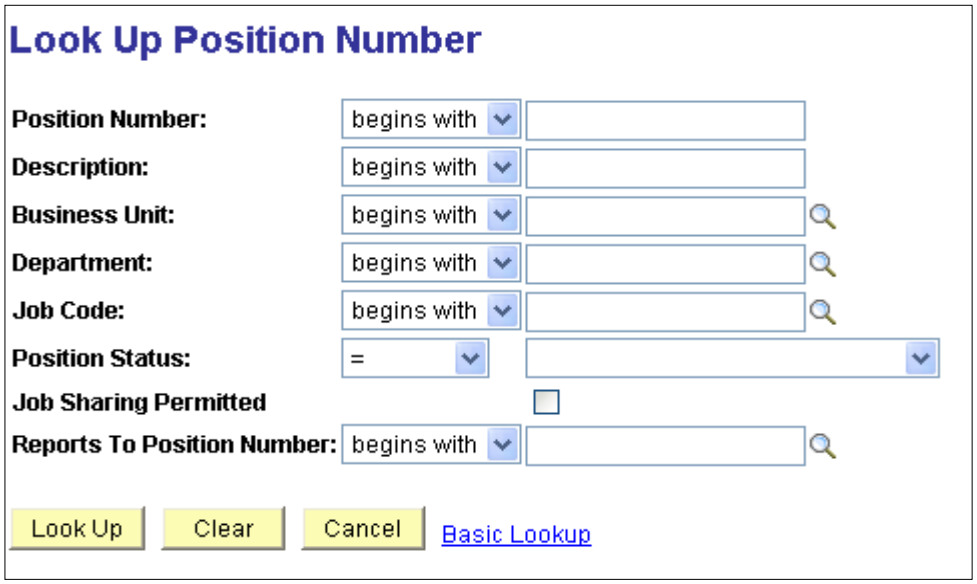
Action – Defaults to *Hire* for new employees.

Reason – This will be Hire.

Last Start Date – This will fill in with the hire date after being saved.

Expected Job End Date – Not currently being used.

Position Number – Enter the position number that is on the requisition or select a position number from the position lookup page by clicking on beside the **Position Number** field. The system displays the following lookup page.



Enter information in one of the fields in which you would like to search by and click Lookup. Click on the appropriate position and the system populates the **Position Number** field with your selection.

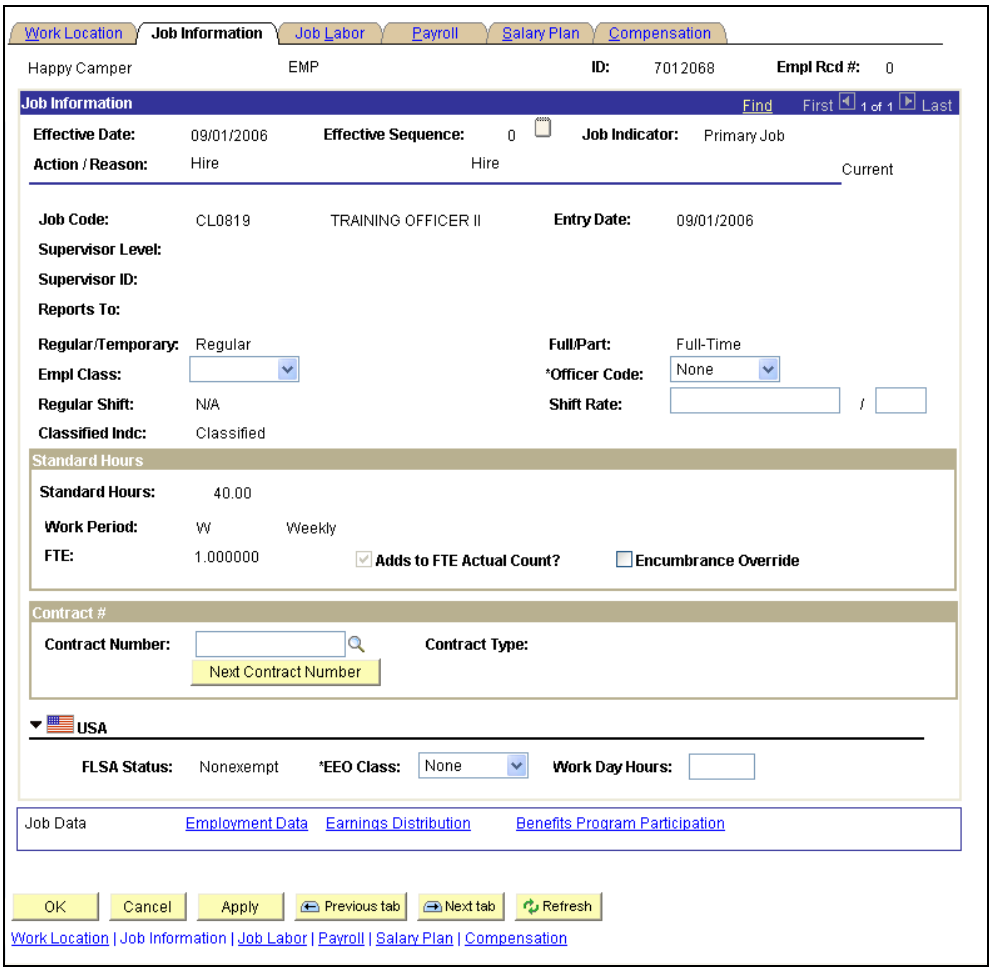
When you tab out of the **Position Number** field, the system automatically fills in the **Position Entry Date** field with the hire date. The system populates several fields from the Position Data table. This is why verifying that the position data is correct before beginning the hiring process is so important

When a **Position Number** is input, the following fields populate on the **Work Location** page:

- **Regulatory Region** – Defaults to *USA*.
- **Company** – Defaults to *ND*.
- **Business Unit** – Defaults to *your business unit*.
- **Department** – Defaults to the department to which the employee belongs.
- **Department Entry Date** (to the right of **Department**) – Indicates the date on which the employee begins work for this department.
- **Location** – Defaults the code used to identify the physical location where the employee will be performing their job.
- **Establishment ID** – Not currently used.

Note: There may be instances in which the defaulted information from the position number in the above fields is not correct. The information should be corrected in position management where possible. If the information in position management does not pertain to all the employees in that position (ex. temporary positions) you may click on the override position data button which will open up these fields for entry. It is very important that you click on the override position data button when you are finished to close these fields again. **If you don't close these fields, the link between position data and job data is broken.**

Click the **Job Information** tab and the following page will appear.



JOB INFORMATION PAGE

The following fields populate from the **Position Number** entered on the previous page:

- **Job Code –** Identifies the job the employee performs.
- **Entry Date –** Indicates the date the employee begins work in this job.
- **Supervisor Level** – Not currently being used.
- **Supervisor ID** – Not currently being used.
- **Reports To** – Not currently being used.

- **Regular/Temporary** and **Full/Part (Time)** – Defines the type of employment.
- **Empl Class –** Not currently being used.
- **Officer Code –** Defaults to *None*.
- **Regular Shift –** The State of North Dakota is not using **Regular Shift.**
- **Shift Rate –** The State of North Dakota is not using the **Shift Rate** fields for tracking information. Shift information is entered on the payline.
- **Classified Indc -** Defaults from position data as to what type of position this is.

Standard Hours – The number of hours per week that the employee will work. A value defaults from the position.

Work Period – The standard time period in which employees must complete the standard hours. This should always be W for Weekly.

FTE – Is defaulted according to the employee's standard hours. (Example: If the standard hours are 20, the FTE will be .5)

Contract Number – Not currently being used.

To access the **FLSA Status** and **EEO Class** fields, click on USA to expand the section.

FLSA Status – The system fills in this field based on the job code assigned to this employee. FLSA status indicates whether this job is exempt or nonexempt according to the Fair Labor Standards Act. FLSA status also helps determine benefits eligibility in PeopleSoft Benefits Administration.

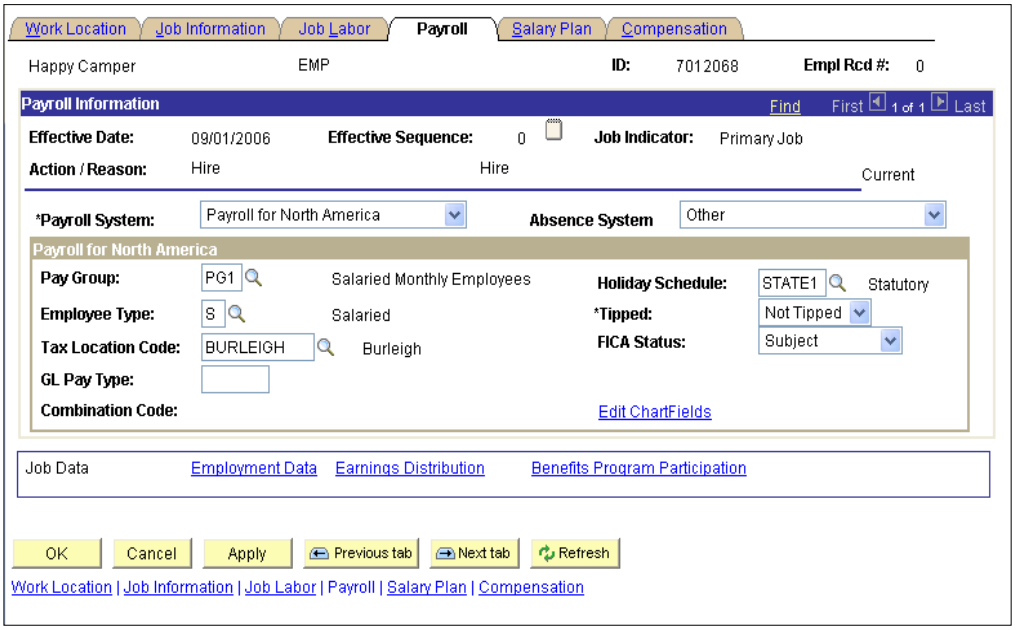
EEO Class – Not currently being used. Should default to none.

Work Day Hours – Workday hours are standard hours divided by 5. Only required if FLSA status is nonexempt. (Example: If standard hours are 40, the work day hours should be 8.)

Note: There may be instances in which the defaulted information from the position number in the above fields is not correct. The information should be corrected in manage positions where possible. If the information in manage positions does not pertain to all the employees in that position (ex. temporary positions) you may click on the override position data button which will open up these fields for entry. It is very important that you click on the override position data button when you are finished to close these fields again. **If you don't close these fields, the link between position data and job data is broken.**

Note: The Job Labor tab is NOT used.

Click the **Payroll** tab and the following page will appear.



PAYROLL PAGE

Payroll System – Defaults to *Payroll for North America*.

Pay Group – Enter the pay group or click on to list the pay group codes. Once the pay group has been entered, the following information defaults:

Holiday Schedule – Identifies the paid holidays for which an employee is eligible. Need to verify that the default is correct for that employee.

- **State1** is the statutory holidays.
- **None** is no holidays.
-

Employee Type – Records how the employee reports time. Examples would be Hourly or Salaried. Need to verify that the default is correct for the employee**.**

Tipped – This is currently not being used.

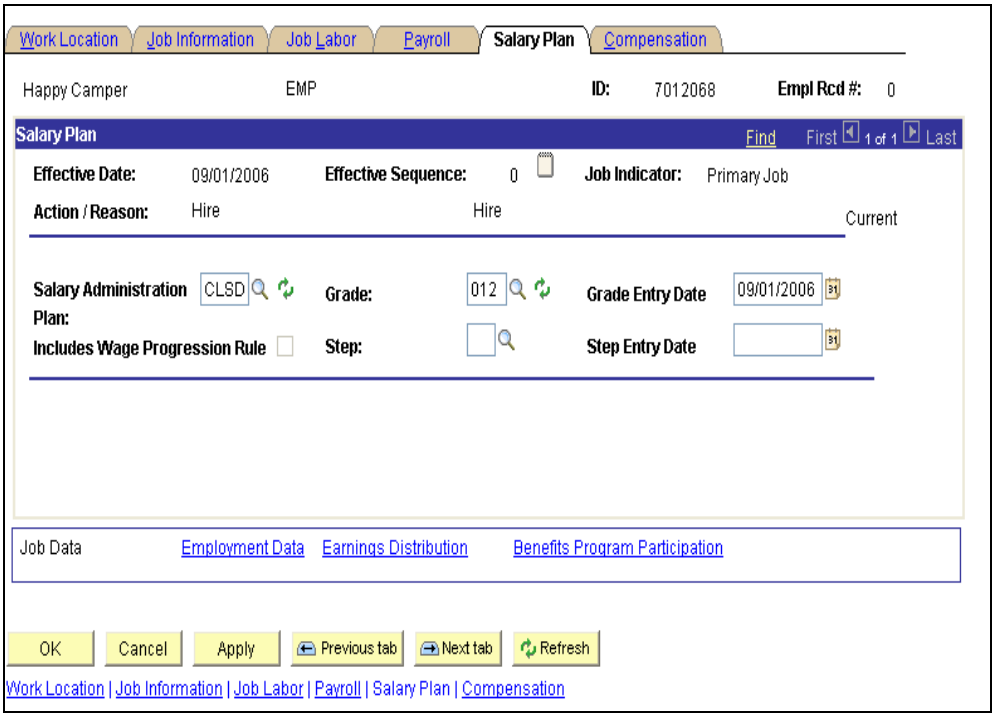
Tax Location Code – List the code used to identify the county in which the employee works.

FICA Status– Indicates whether the employee is exempt, subject, or subject to Medicare only. This field defaults to *Subject*.

GL Pay Type- North Dakota is not using this field. Leave this field blank.

Combination Code - North Dakota is not using this field. Leave this field blank.

Click on the **Salary Plan** tab and the following page will appear.



SALARY PLAN PAGE

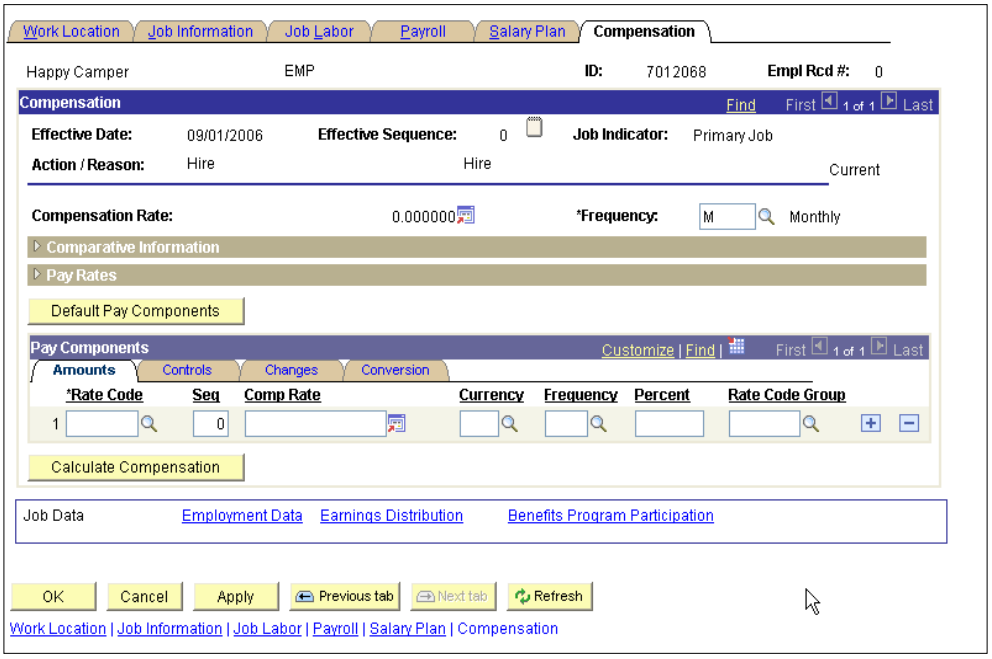
Salary Administration Plan & Grade – Used to tie together a collection of salary grades for which groups of similar employees will be eligible. These fields default from **Position Information**.

Grade Entry Date – Indicates the date on which the employee is first compensated from the **Salary Grade**.

Step – Is not being used at this time.

Step Entry Date - Is not being used at this time.

Click on the **Compensation** tab and the following page will appear.



COMPENSATION PAGE

Comp Frequency - Defaults to *M* for Monthly or *H* for Hourly.

Rate Codes – Choose from search list. (NAANNL does not apply to the State.) The description will indicate which rate code to use.

1. *Compensation*: Enter compensation amount if not defaulted from the rate code.
2. *Currency*: Defaults to USD (US Dollars).
3. *Frequency and Percent*: Defaults from rate code.
4. *Rate Code Group*: Not currently being used.

Click on Calculate Compensation button.

EMPLOYMENT DATA

Click on the Employment Data hyperlink to continue the hiring process and enter Employment Data information.

When you click on the Employment Data hyperlink, the following page will appear.

EMPLOYMENT INFORMATION PAGE

The **Employment Information** components are used to record employment information such as business title and position phone.

Organizational Instance Section – This information will populate when saved. The Original Start Date, the Last Start Date, the First Start Date and the Org Instance Service Date will all be the hire date.

Termination Date - The system displays this date from the Job Data component when an employee terminates.

Last Assignment Start Date – This will change to the hire date after being saved.

Assignment End Date – Not currently being used.

***Home/Host** – Defaults to *Home*.

Company Seniority Date – Defaults to the hire date when the record is saved. The **Company Seniority Date** is the continuous service date and is used for service award recognition. Once the record is saved you can go back in and change this date by clicking on the Override button next to the date; change the date and then save. Leave the box checked next to override.

Benefits Service Date - This is used for leave accrual. If the hire date is not the first of the month, you should enter the first day of the month of the hire to accrue the appropriate accrual of leave hours. Do this by clicking on the Override button next to the date; change the date and then save. Leave the box checked next to override.

Seniority Pay Calc Date - This will change to the hire date after being saved. We currently are not using this date.

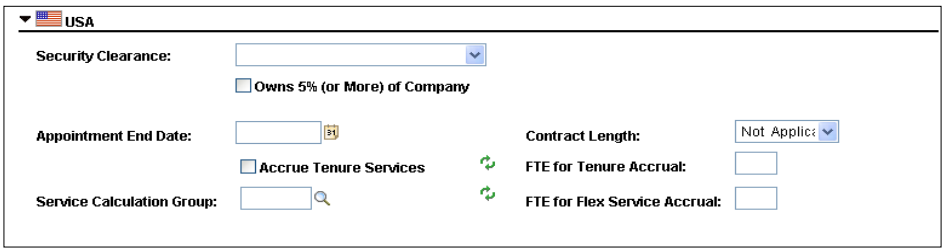
Probation Date – Enter the end date of the new employee's probation/provisional period.

Professional Experience Date - We currently are not using this date.

Last Verification Date – Displays the latest date on which the worker verified his or her personal data in the system. This is not currently being used.

Business Title – Defaults from Position Data.

Note: If you are hiring a temporary/seasonal employee, click the USA to expand the section as shown below.

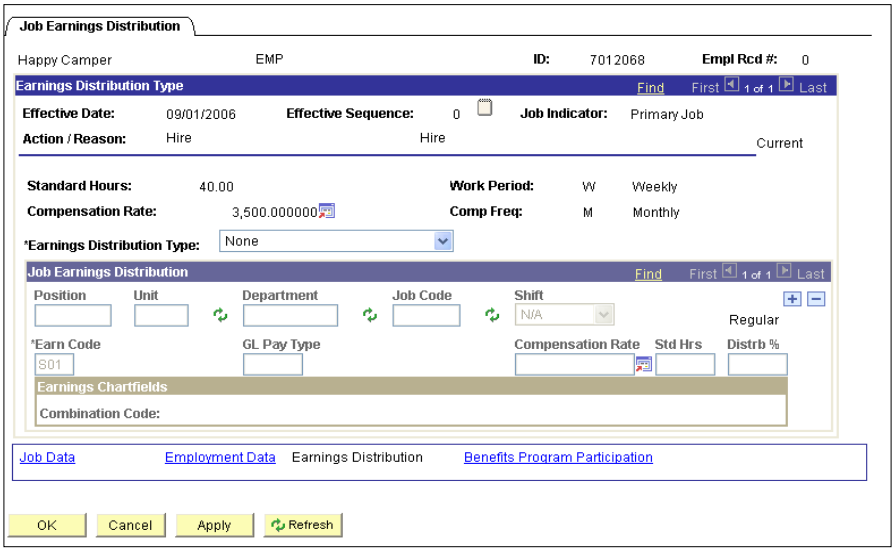


Appointment End Date – Enter the expected end date for the temporary/seasonal position.

JOB EARNINGS DISTRIBUTION

Click on the Earnings Distribution hyperlink to continue the hiring process.

When you click on the Earnings Distribution hyperlink, the following page will appear.



JOB EARNINGS DISTRIBUTION PAGE

The Job Earnings Distribution earnings code will need to be verified for each employee.

Please verify the following:

1. The earnings code for the PG1(& MJ1) pay group for salaried employees is defaulted to earnings code S01 for regular earnings. If the employee is to receive temporary earnings, the earnings code needs to be changed to S02 for temporary earnings on the job earnings distribution page.
2. The earnings code for the PG2 pay group for hourly employees is defaulted to earnings code S02 for temporary earnings. If the employee is to receive regular earnings, the earnings code needs to be changed to S01 for regular earnings on the job earnings distribution page.
    - If the defaulted information is correct, you do not have to change anything.
    - If the earnings code needs to be changed, you need to do the following:
        - Earnings Distribution Type – Select by percent.
        - Earn Code – Change to proper earnings code (S01 or S02)
        - Distrb – type is 100% for distribution.

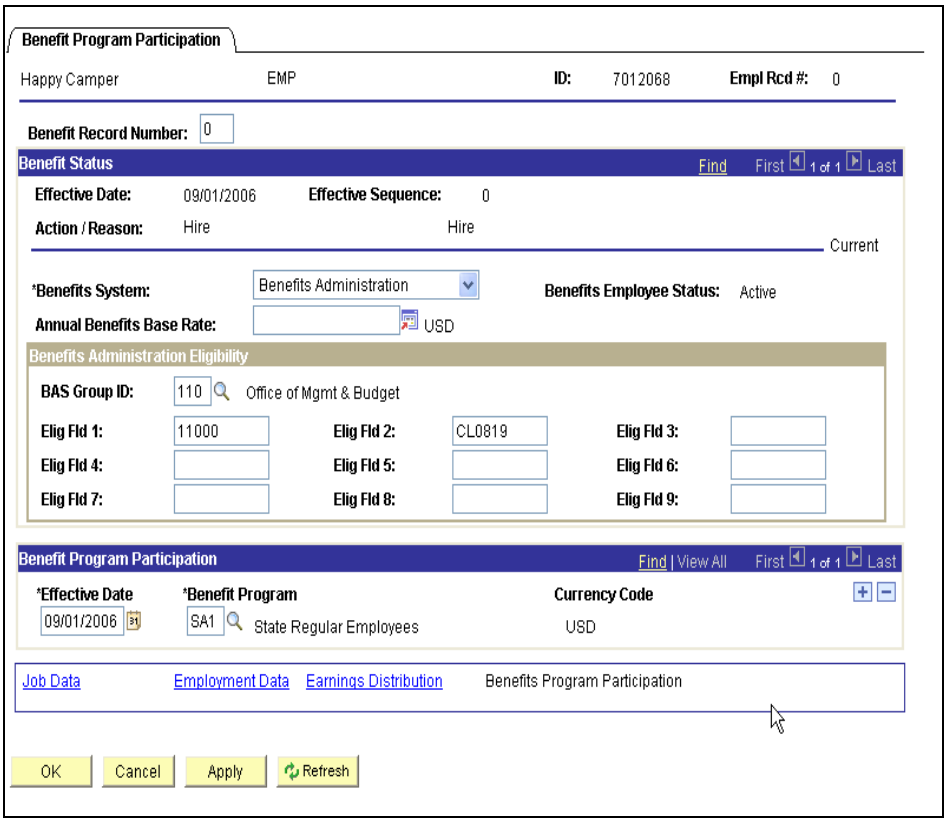
This will ensure that your employee's salary for hourly base pay is paid using the correct earnings code.

BENEFITS PROGRAM PARTICIPATION

Click on the Benefit Program Participation hyperlink to continue the hiring process and enter Benefit Program Participation data.

The **Benefit Program Participation** page specifies the benefit program the new employee is enrolling in.

When you click on the Benefits Program Participation hyperlink, the following page will appear.



BENEFIT PROGRAM PARTICIPATION PAGE

Benefits System – Defaults to *Benefits Administration*.

BAS/Group ID – Verify that this is the correct Business Unit.

Effective Date – The date the benefit program will take effect for the new employee. (This will most likely be the employee's hire date.)

Benefit Program – The appropriate benefit program will populate from the Position Information.

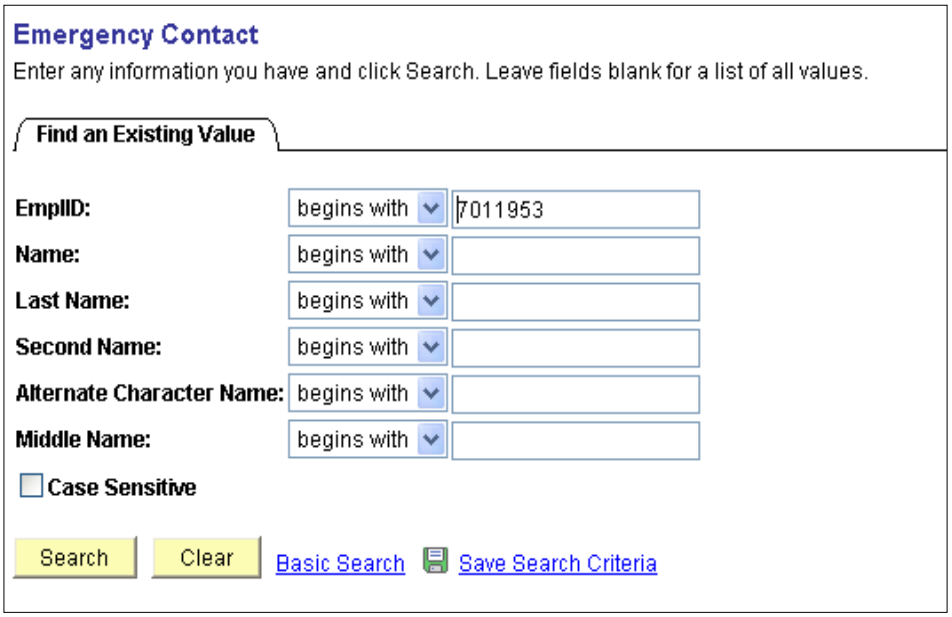
Benefit Program Name	Description
SA1	Regular Employees
SA3	Temporary Employees
SA4	Legislators
SA5	State Active Duty

Click OK to save all data entered. Once done this will take you back to the biographical information page. You can now continue to add Emergency Contacts, Worker's Compensation, Designated Medical Provider and Driver's License information as described in the following pages.

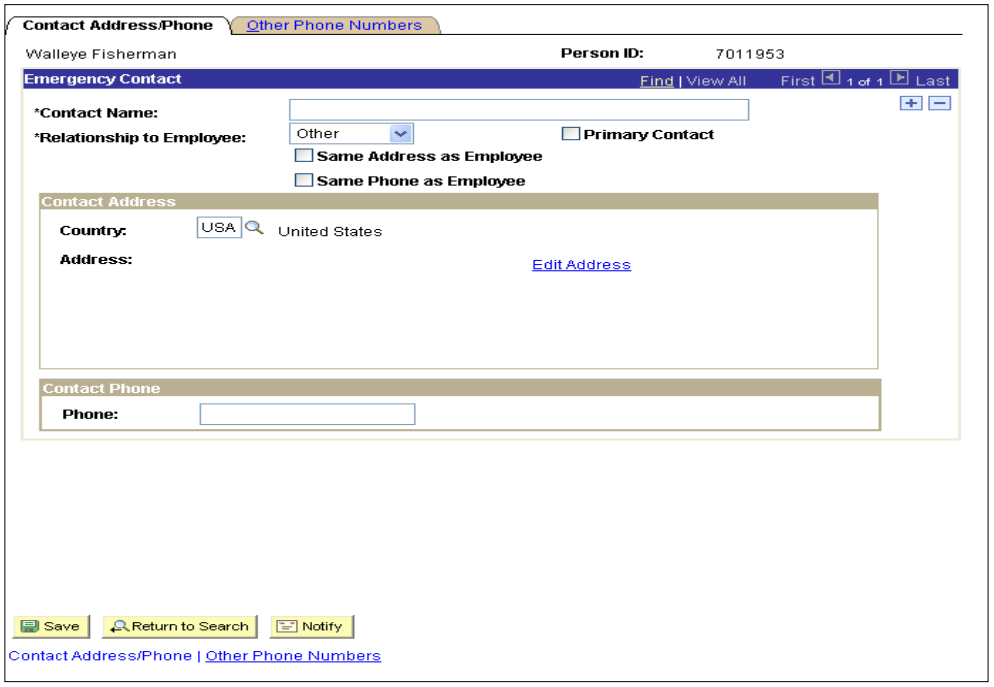
Note: You may want to make note of the employee ID number the system has assigned the new employee. You may need this number to initiate the Emergency Contact, Worker's Compensation, Designated Medical Provider and Driver's License data entry processes.

EMERGENCY CONTACT

To enter an employee's emergency contact information, click on **Main Menu > Workforce Administration > Personal Information > Personal Relationships > Emergency Contact** and the screen below will appear.



Input the EmplID and click Search. The following screen will appear.



Contact Name – Enter the name (last name, first name) of the emergency contact person (mixed case).

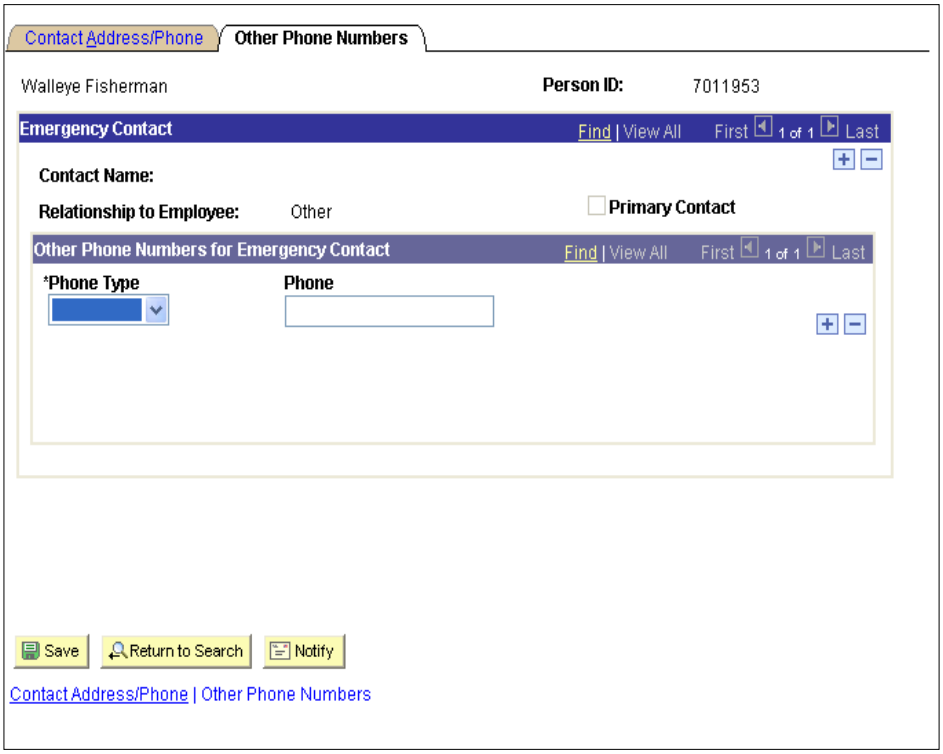
Relationship to Employee – Click the to select the appropriate value from the drop down selections.

Primary Contact – Click the box if this person will be the primary emergency contact.

If the contact person has the same address and phone number as the new employee, check the **Same Address/Phone as Employee** box. If not, enter the address information as appropriate.

Phone – Enter the phone number for the emergency contact person.

If you need to enter additional phone numbers for the contact person, click the **Other Phone Numbers** tab to display the page.



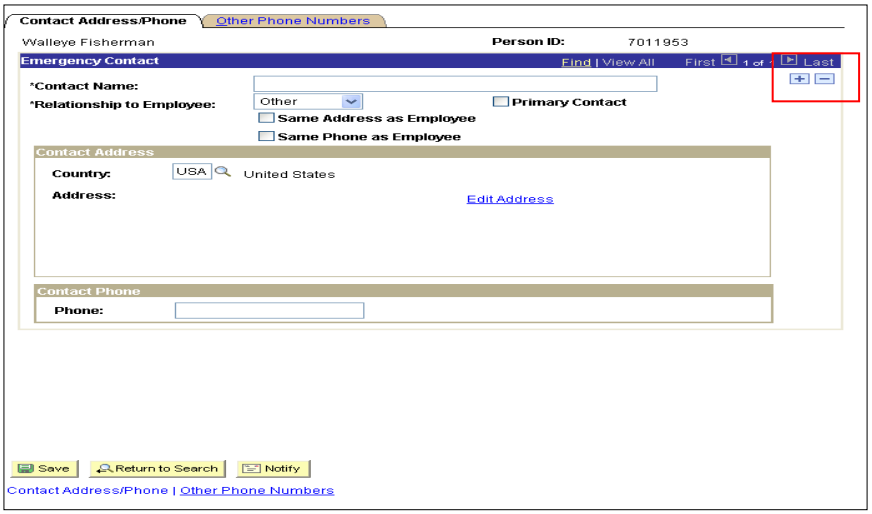
Phone Type – Click the to select the type of phone number (e.g. cellular, pager, etc.) from the drop down selections.

Phone – Enter the phone number for the type selected.

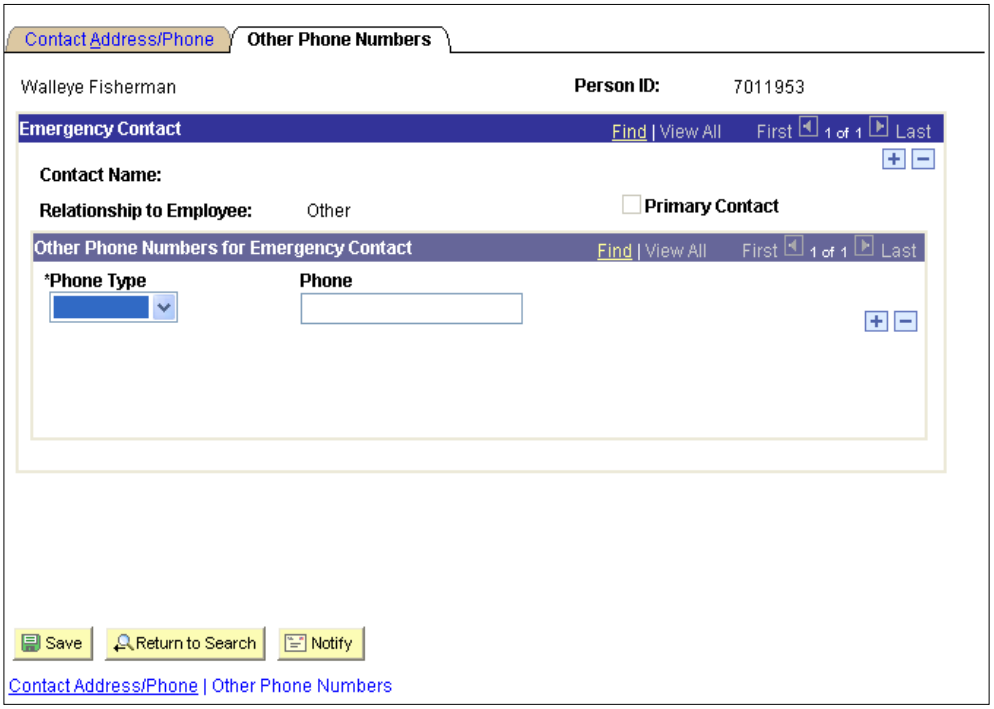
If you are finished entering contact information, click .

ENTERING ADDITIONAL EMERGENCY CONTACTS

To enter additional emergency contacts, click on the + across from the **Contact Name** field. A new emergency contact record will appear *below* the original as shown in the following screen shot. Complete information.



Click on **Other Phone Numbers**, if needed.



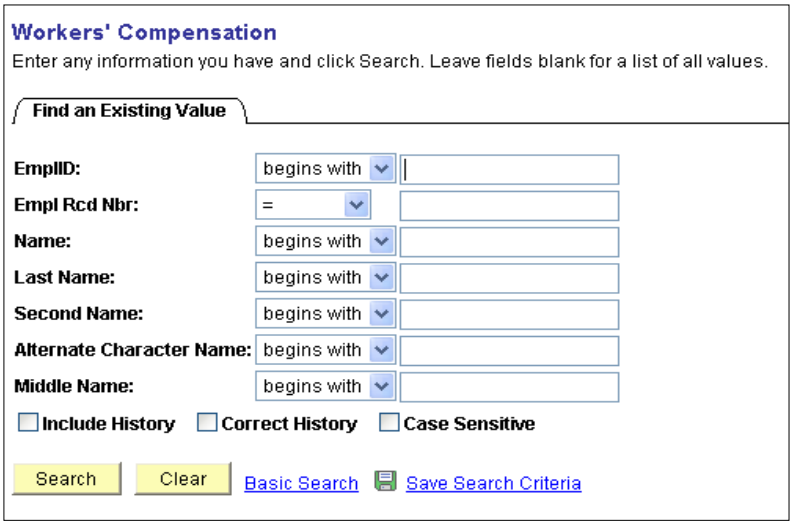
Enter the new contact information as described earlier.

To enter additional phone numbers for any of the emergency contacts, follow the same procedures by clicking the + across from the **Phone Type** and **Phone** fields under the **Other Phone Numbers** Tab.

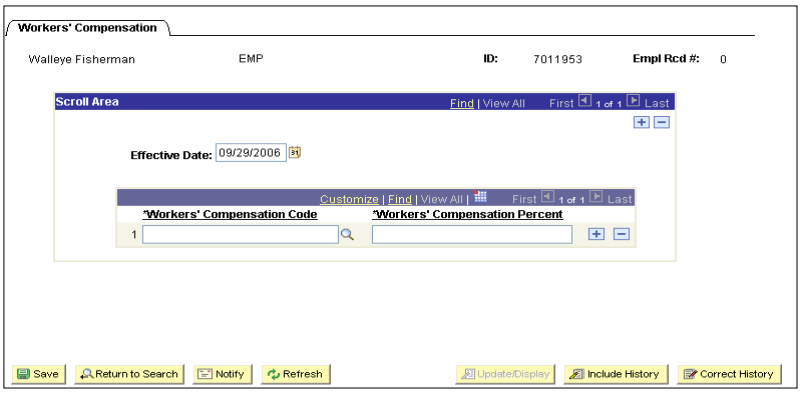
Click Save to save all emergency contact information.

WORKERS' COMPENSATION

To enter an employee's Workers' Compensation information, click on **Main Menu > Workforce Administration > Job Information > Workers' Compensation.** The following screen will appear.



Input EmplID and click on Search. The following screen will appear:



Effective Date – The first entry should have the effective date of the hire date, if any changes are made after that, the date should be when the change is effective.

Workers' Compensation Code – Enter the code that identifies the compensation class for the employee. Classes can be found through a lookup.

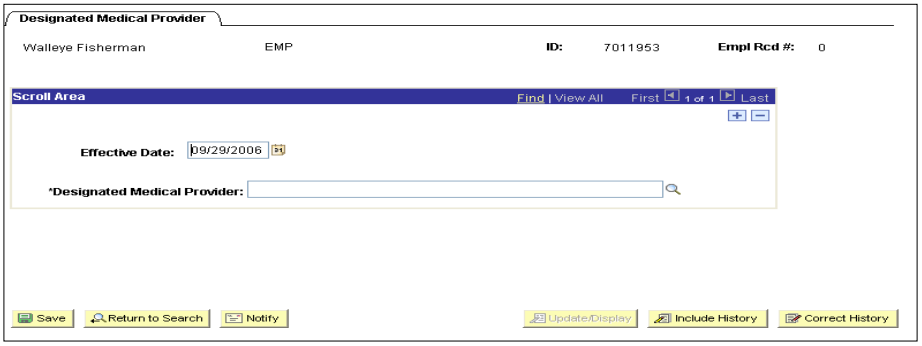
Workers' Compensation Percent – Enter the percent of the job assigned to each rate class (the percent totals must equal 100%).

Note: An employee can have a maximum of two Worker's Compensation codes with a combined percentage total of 100 percent.

DESIGNATED MEDICAL PROVIDER

To enter an employee's Designated Medical Provider information, click on **Main Menu** > **Workforce Administration > Personal Information > Personal Relationships > Designated Medical Provider** and the screen below will appear.

Input the EmplID and click on search and the following screen will appear:



Effective Date – The first entry should have the effective date of the hire date, if any changes are made after that, the date should be when the change is effective.

Designated Medical Provider – Enter the name that identifies the medical provider for the employee. Providers can be found through a lookup.

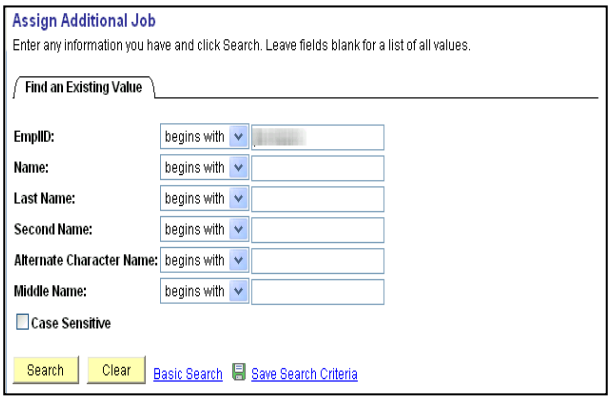
ADD ADDITIONAL ASSIGNMENT

When you have an employee that will be active in another position within your agency you will need to add additional assignment.

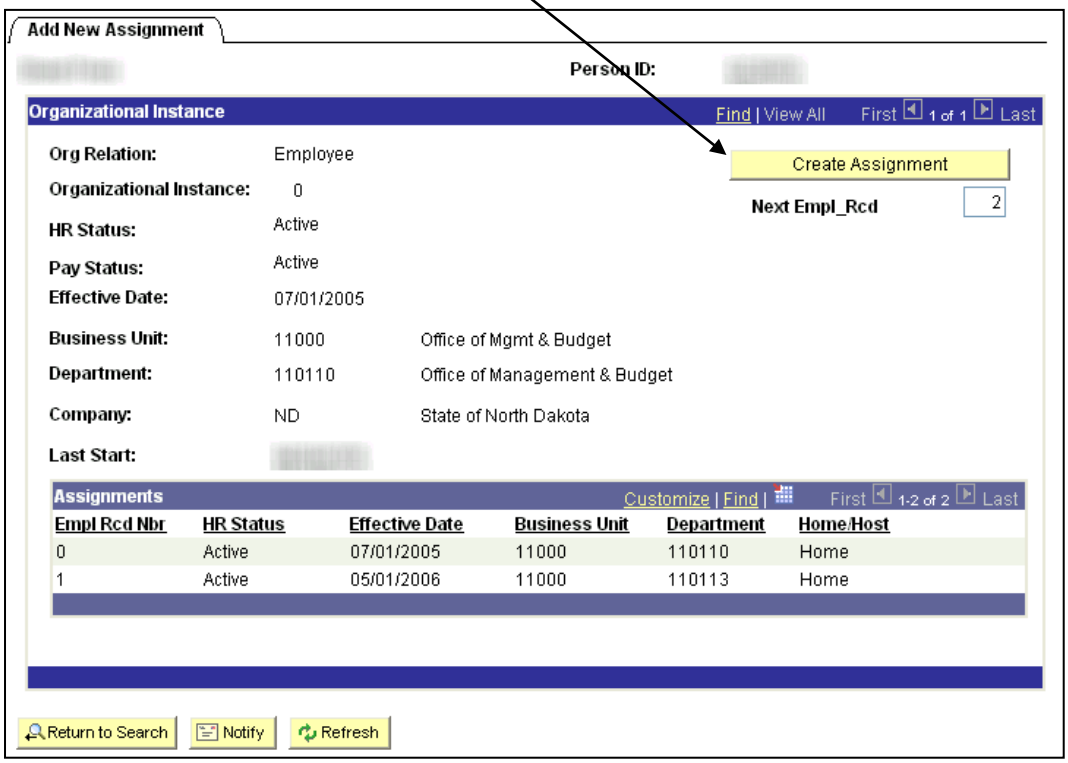
HR: (Navigation: Workforce Administration> Job Information> Add Additional Assignment)

- Enter the employee's EmplID
- Click on the Search Button

.



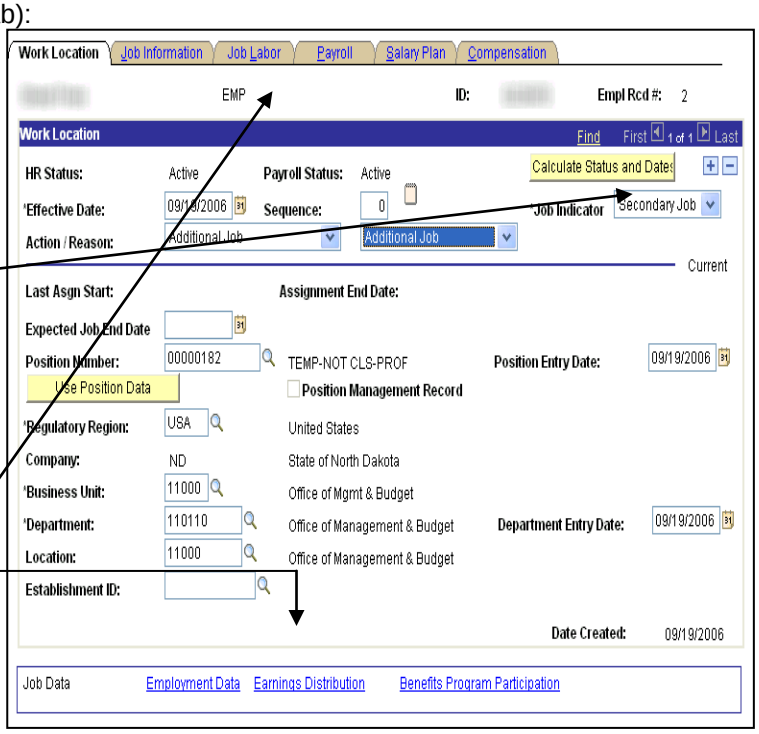
Click on the Create Assignment Button



Add Additional Assignment (work location tab):

- Change the effective date to the hire date
- Effective sequence of 0
- Action of Additional Job
- Reason of Additional Job
- Job Indicator will default to Secondary Job

- Verify the information on
  - Work Location
  - Job Information
  - Payroll
  - Salary Plan
  - Compensation
  - Earnings Distribution



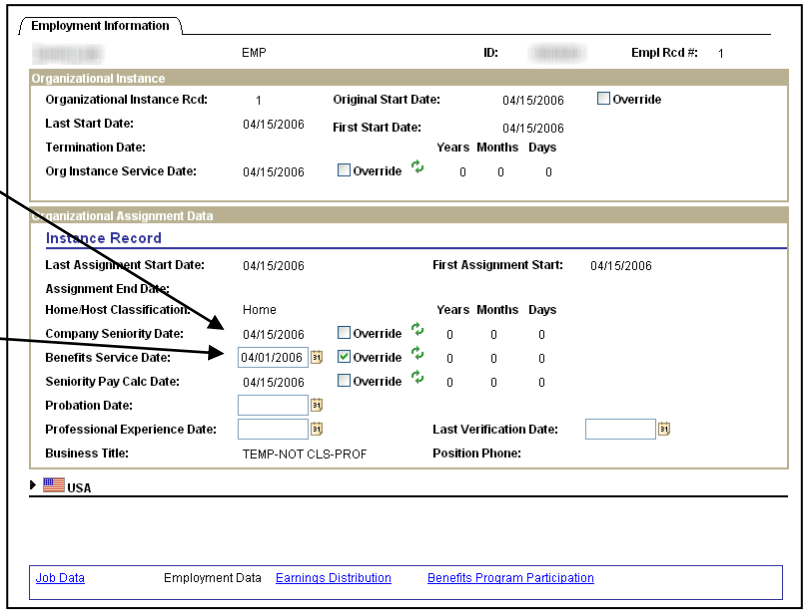
Make any necessary changes.
The paygroup for a multiple job employee will always be MJ1.

The Benefit Record Number on the Benefit Program Participation page will default to match the Empl Rcd number, and should be left as that.

After you have saved this data click on the Employment Data Page.

The Company Seniority Date:
This will default to the hire date of this position.

The Benefits Service Date:
This will default to the hire date and you should change it to the first of the month of the hire.
You may do this by clicking the over ride box, changing the date, and click on save.



The other HR page that should be completed for this employee is the Workers' Compensation page. (Navigation: ND State Applications > Workers' Compensation OR Workforce Administration > Job Information > Workers' Compensation)

The rest of the HR pages (Personal Data, Emergency Contact, Designated Medical Provider and Driver's License Data) and Payroll pages (Direct Deposit, Employee Tax Distribution, Employee Tax Data, and General Deduction Data) should not be changed since this information should follow Empl Rcd 0.

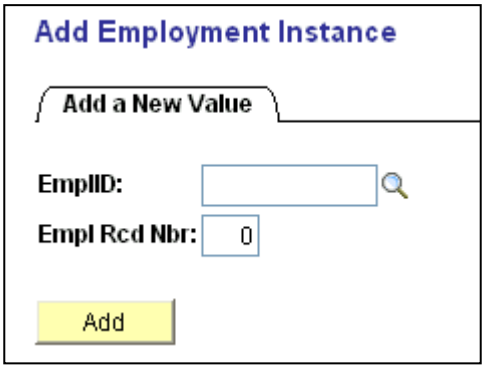
Please move this employee's other empl recd numbers to the MJ1 Paygroup.

ADD EMPLOYMENT INSTANCE

When you have an employee that will be active in another position for another State Agency within the Peoplesoft system you will need to add an employment instance.

HR: (Navigation: Workforce Administration> Personal Information> New Employment Instance)

- Enter the employee's EmplID
- Empl Rcd Nbr
  (The system will assign this when you tab out of the EmplID)
- Click on the Add Button

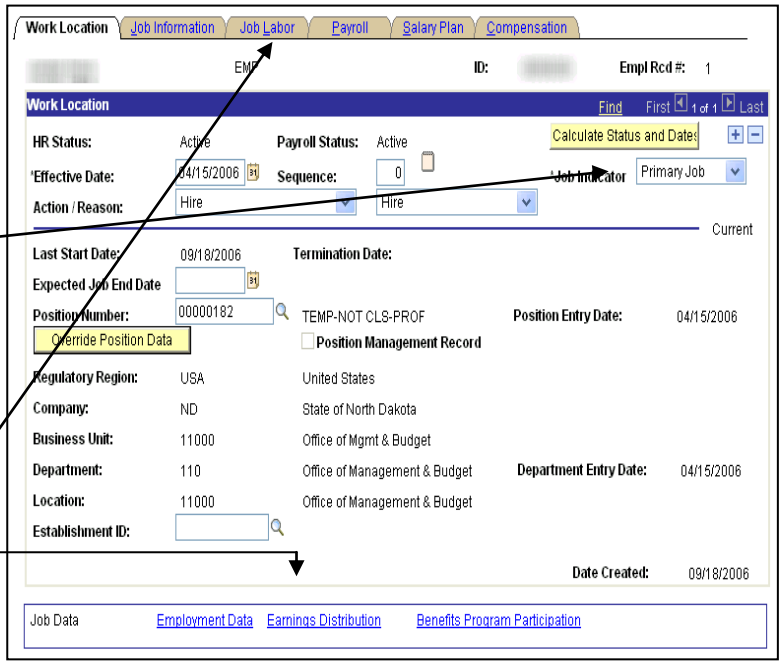


.

Add Employment Instance (work location tab):

- Change the effective date to the hire date
- Effective sequence of 0
- Action of Hire
- Reason of HIR
- Job Indicator will default to Primary Job and it should be Secondary Job

- Verify the information on
  - Work Location
  - Job Information
  - Payroll
  - Salary Plan
  - Compensation
  - Earnings Distribution



Make any necessary changes.

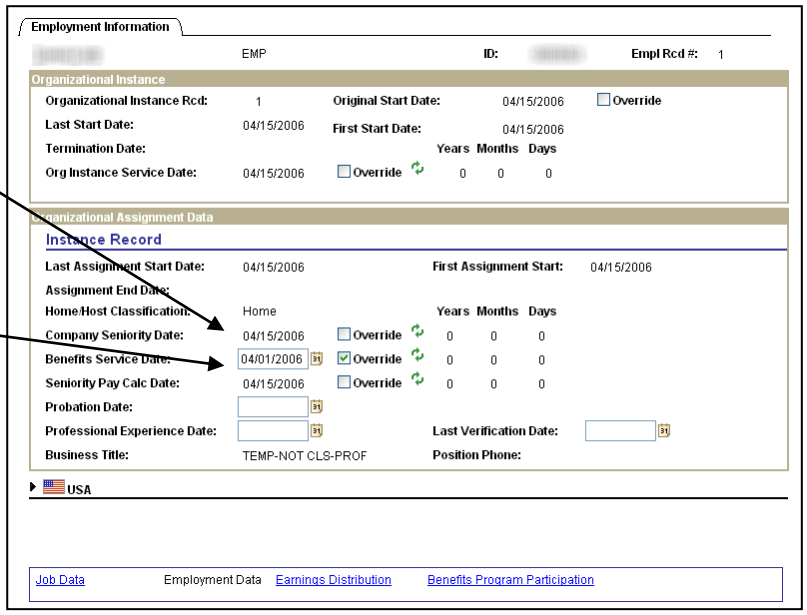
The paygroup for a multiple job employee will always be MJ1.

The Benefit Record Number on the Benefit Program Participation page will default to match the Empl Rcd number. It should be left as that if the employee is employed with a different business unit.

After you have saved this data click on the Employment Data Page.

The Company Seniority Date: This will default to the hire date of this position.

The Benefits Service Date: This will default to the hire date and you should change it to the first of the month of the hire. You may do this by clicking the over ride box, changing the date, and clicking on save.



The other HR page that should be completed for this employee is the Workers' Compensation page. (Navigation: ND State Applications> Workers' Compensation) and the Designated Medical Provider (Navigation: Workforce Administration> Personal Information> Personal Relationships> Designated Medical Provider).

The rest of the HR pages (Personal Data, Emergency Contact, and Driver's License Data) should not be changed since this information should be maintained by the agency that employs Empl Rcd 0. The Payroll page for Direct Deposit should not be changed either since the agency that employs Empl Rcd 0 also maintains this record. It is very important to inform the employee that his direct deposit information must remain the same for both positions.

The other Payroll pages (Employee Tax Distribution, Employee Tax Data, and General Deduction Data (Navigation: Payroll for North America> Employee Pay Data USA> Tax Information or Deductions)) should not be changed since this information should be maintained by the agency that employs Empl Rcd 0. Benefits and deductions are taken on the primary job of each company for whichever benefits and deductions the employee is eligible for.

MAINTAINING EMPLOYEE INFORMATION

OVERVIEW

When you administer your workforce, you'll spend the bulk of your time keeping a history of your employees' careers with your organization. The information you maintain is, for the most part, the same type of information that you enter to hire or add workers to your workforce.

Before you can view information on a particular person, you must have already created a human resources record for that person, in other words, already added the person into PeopleSoft Human Resources.

OBJECTIVES

At the completion of this section, you will be able to view and update the following employee information:

1. Name
2. Address
3. Emergency Contacts
4. Driver's License
5. Pay Rate
6. General Comments

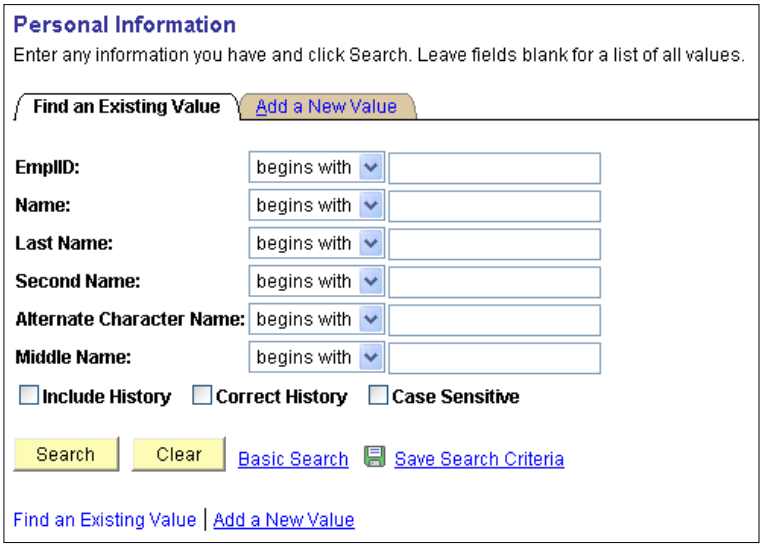
In addition, you will be able to process the following Job Data employee transactions:

1. Leave of Absence – Unpaid
2. Leave of Absence – Paid
3. FMLA Intermittent Leave
4. Return from Leave
5. Promotion / Demotion with NO Salary Increase
6. Promotion / Demotion with A Salary Increase
7. Hire Temporary as a Full Time Employee
8. Transfers
9. Retirement / Termination
10. Rehire

UPDATING EMPLOYEE INFORMATION

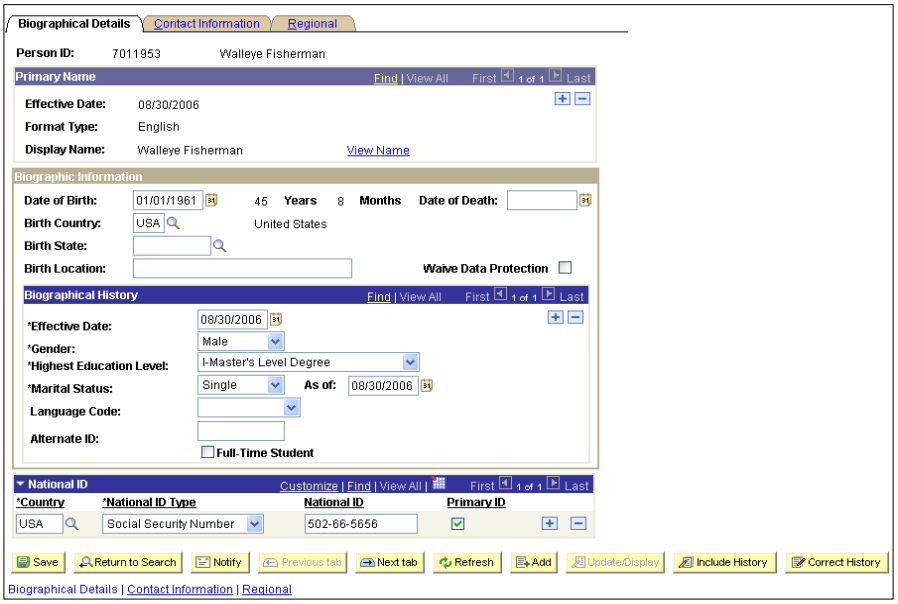
CHANGING PERSONAL DATA

To change an employee's personal information such as employee name and address, use the following navigation path: **Main Menu** > **Workforce Administration > Personal Information > Modify a Person**. The following page will appear.

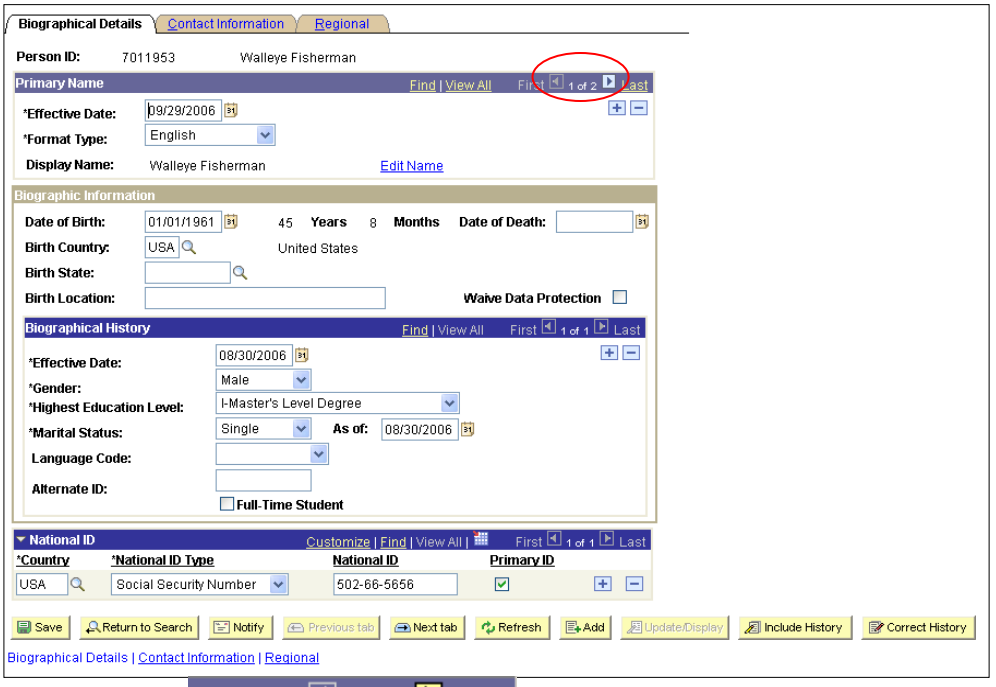


Note: All updates to employee information will begin with this search page. You may search by Employee ID, or Name.

Once you have located the correct employee, the following page will appear.



To make a change to either the employee's name or address click on the + across from the **Effective Date** field and the following page will appear.



Notice that this

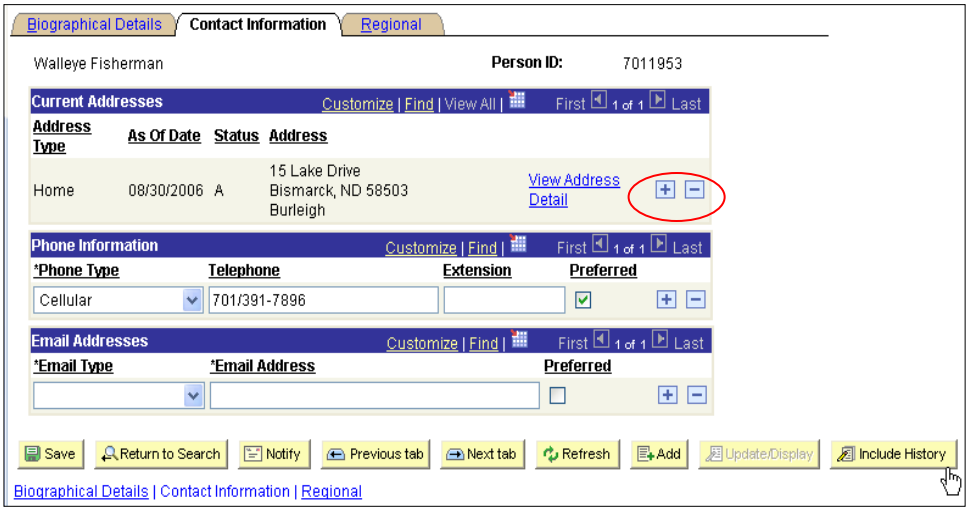
is now shown. The first is the record that changes will be entered into, and the second is the latest information that was input for the employee.

The **Effective Date** field defaults to the system date. You can put future dates in as well. The effective date identifies when the changes went into effect (or will go into effect) and preserves the history of the changes by keeping the previous information in a separate record.

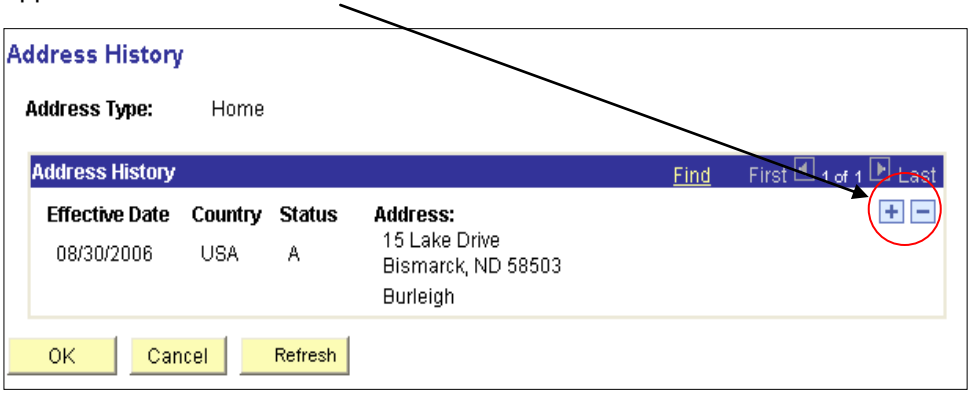
Note: Not all fields for an employee's personal data are effective dated. Changes to **Name**, **Address**, **Marital Status**, and whether an employee is a **Smoker** or **Non-Smoker** are all effective dated. Changes to any other fields in the Personal Data pages are overwritten and no history is kept. This includes phone numbers, educational information, etc.

Enter any name changes on the top record by clicking on Edit Name.

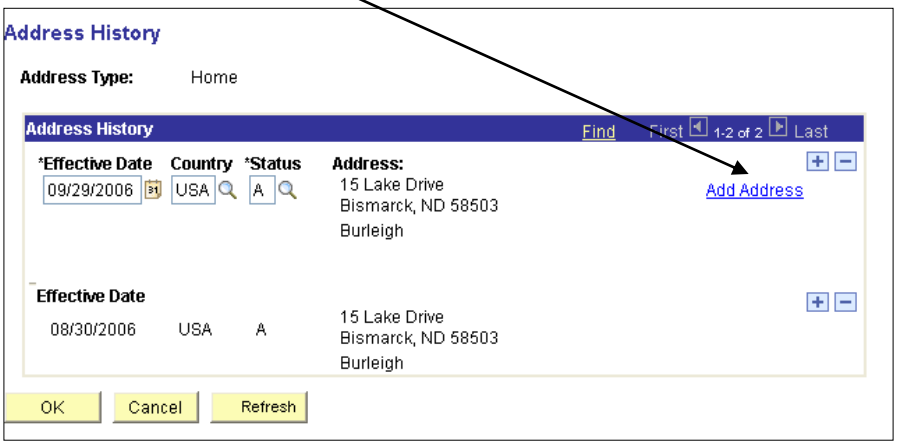
Click on the **Contact Information** tab to make changes to the employee's address, mailing address, or phone number. To change the address you will need to add a row by View Address Detail as shown below:



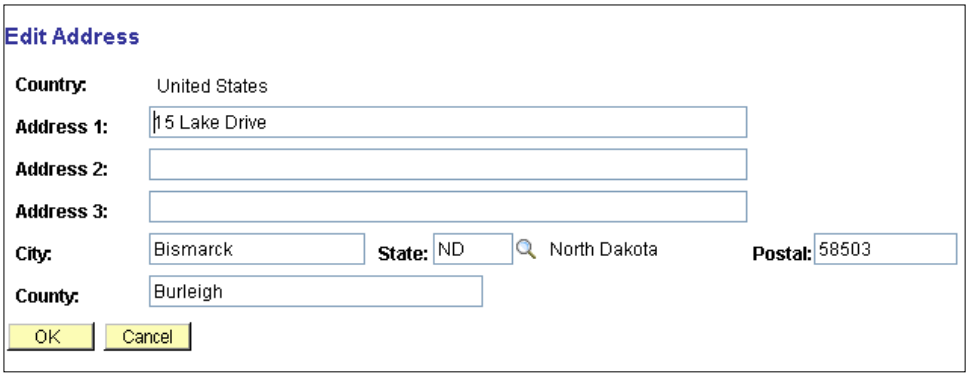
Then add a row by Add Address Detail and the following screen will appear: Then add another row on this screen.



Click on Add Address:



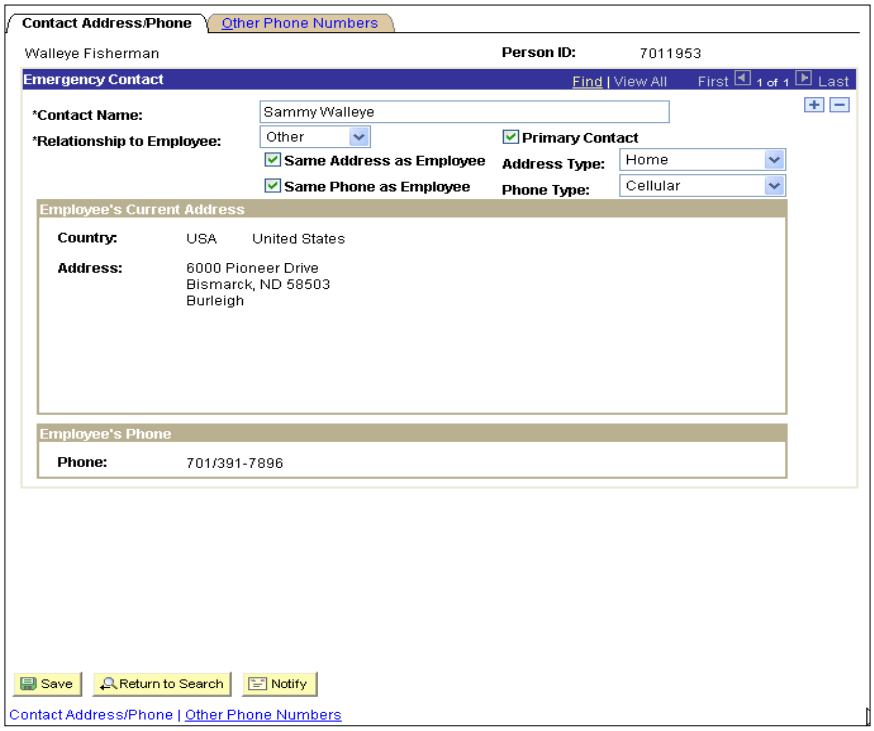
You can now update the address on the screen shown below: When all changes are entered, click on OK and then OK again.



Once all changes are made to an employee's personal data, click Save to save the changes.

EMERGENCY CONTACT

To enter or change an employee's emergency contact information, use the following navigation path: **Main Menu > Workforce Administration > Personal Information > Personal Relationships > Emergency Contact**. The search page will appear as described above. Once you have selected the appropriate employee, the following page will appear.

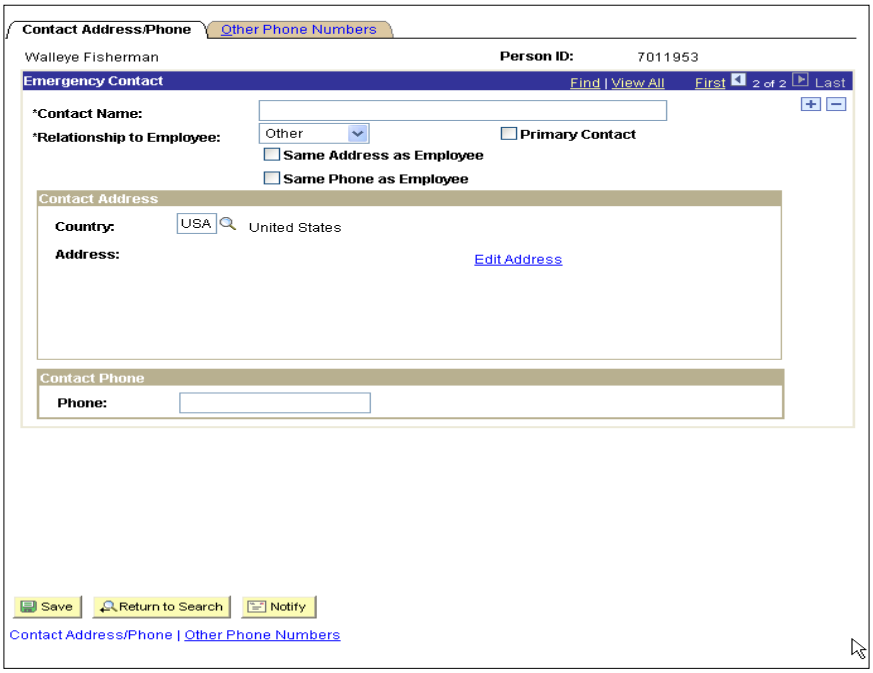


CHANGING CURRENT INFORMATION

To change the current Emergency Contact information, type the new information into the appropriate fields. Since Emergency Contact information is not effective dated, type over the existing information. Click on the **Other Phone Numbers** tab to change other phone numbers if necessary. When you are finished, click Save.

ENTERING ADDITIONAL EMERGENCY CONTACTS

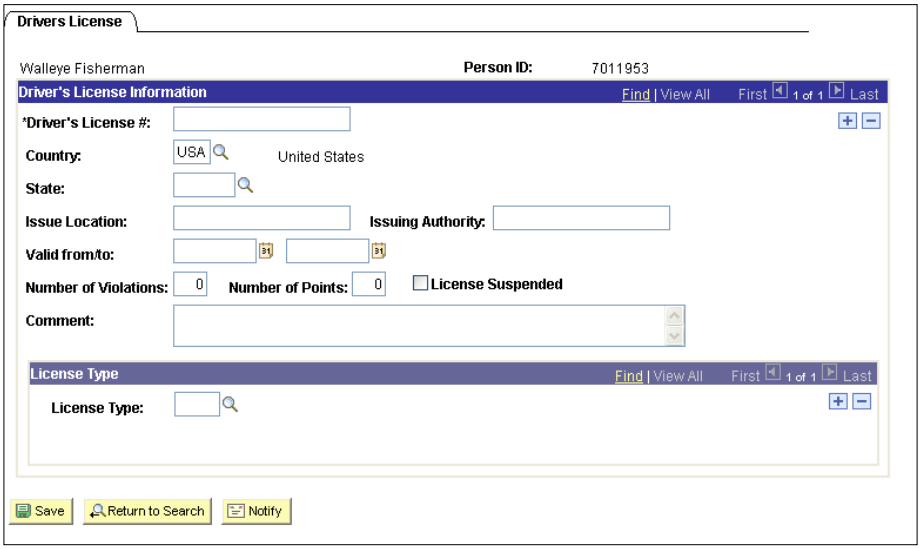
To enter additional emergency contacts, click on the + across from the **Contact Name** field. A new emergency contact record will appear below the original as shown in the following screen shot.



Enter the new contact information and click Save.

DRIVER'S LICENSE

To enter or change an employee's Driver's License information, use the following navigation path: **Main Menu > Workforce Administration > Personal Information > Biographical > Driver's License Data**. The search page will appear as described previously. Once you have selected the appropriate employee, the following page will appear.



CHANGING CURRENT INFORMATION

To change the current Driver's License information, type the new information into the appropriate fields. As with Emergency Contact information, Driver's License information is not effective dated. To change the information, type over the previous entries. When you are finished, click Save.

ENTERING ADDITIONAL DRIVER'S LICENSE INFORMATION

To enter additional Driver's License information, click on the + across from the **Driver's License #** field. A new Driver's License record will appear below the original.

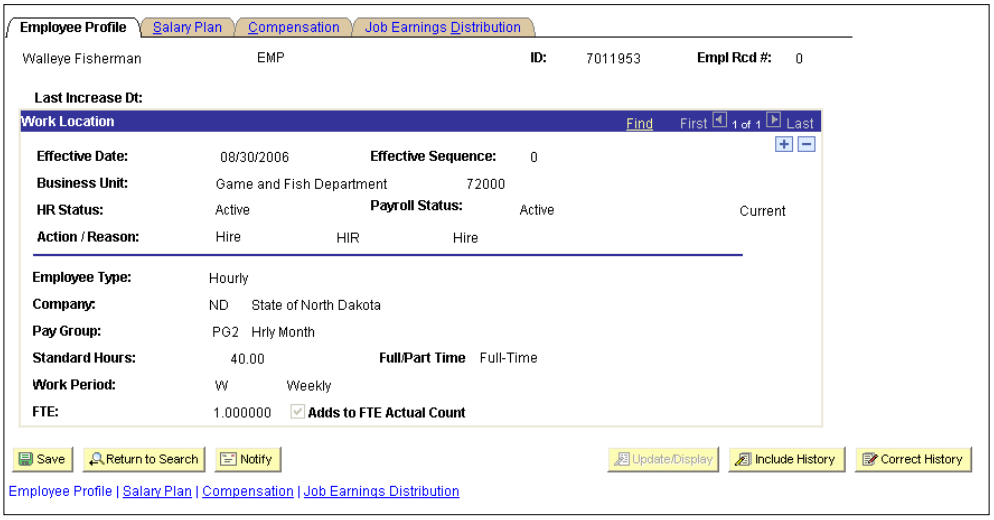
Enter the new information and click Save.

To enter additional Driver's License types, follow the same procedures by clicking the + across from the **License Type** field in the License Type section.

PAY RATE CHANGES

Use the Pay Rate Change pages to enter a salary change for an employee that isn't related to a change on the position. For example: if the salary grade or job code fields change, this update is completed on the position. The Pay Rate Change pages should only be used to update the compensation (i.e. service adjustments and step).

To process pay rate changes, use the following navigation path **Main Menu > Workforce Administration > Job Information > Pay Rate Change**. The search page will appear as described previously. Once you have selected the appropriate employee, the following page will appear.



EMPLOYEE PROFILE PAGE

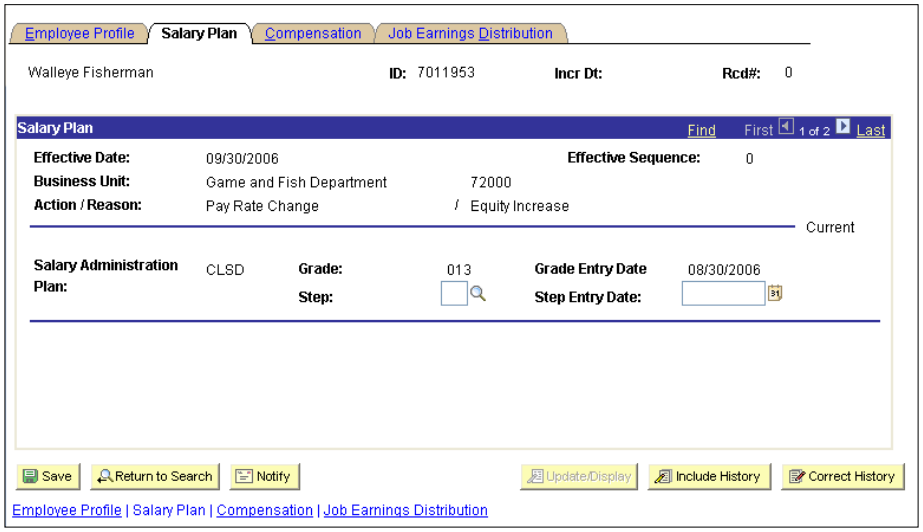
To begin the Pay Rate change process, click on the + located across from the **Effective Sequence** field in the **Employee Profile** Tab. A new record will be created as shown by the First 1 of 2 Last

The **Effective Date** field defaults in the current date. You can put future dates in as well. The effective date identifies when the changes went into effect (or will go into effect) and preserves the history of the changes by keeping the previous information in a separate record.

The **Action / Reason** field defaults to *Pay Rate Change* for the Action. Select a reason code by clicking on the (i.e. equity increase, merit, etc.).

SALARY PLAN PAGE

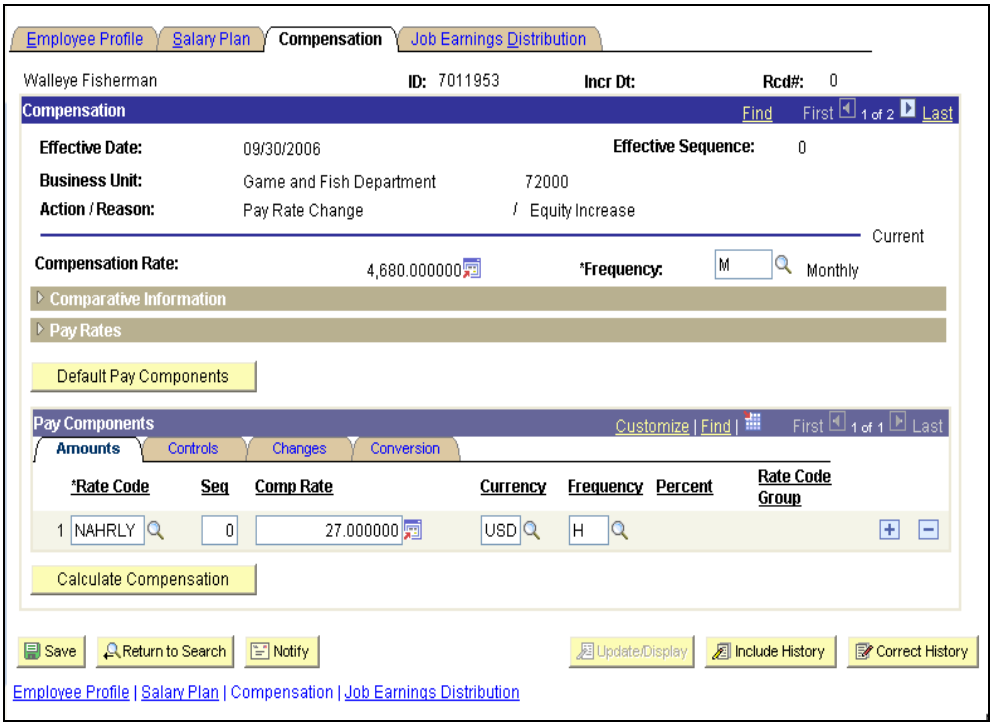
Click on the **Salary Plan** tab and the following page will appear.



This page is currently not applicable.

COMPENSATION PAGE

Click on the **Compensation** tab and the following page will appear.

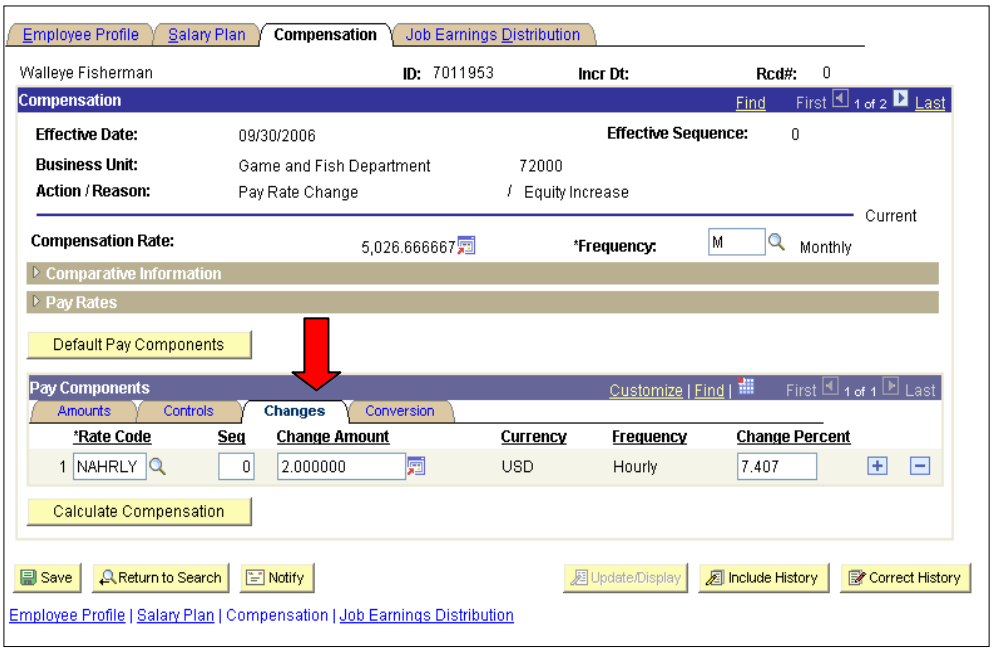


To enter a new pay rate, you can enter the rate code and the new compensation rate.

Click on the calculate compensation button.

Based on the compensation rate and frequency, the system calculates and displays the hourly, daily, monthly, and annual rate for the employee.

The compensation rate is entered in the **Comp Rate** field. To enter either a specific compensation change amount (e.g. a $2000 increase) or a percentage change, click the **Changes** tab (as depicted by the arrow below) and enter the information in the appropriate fields.

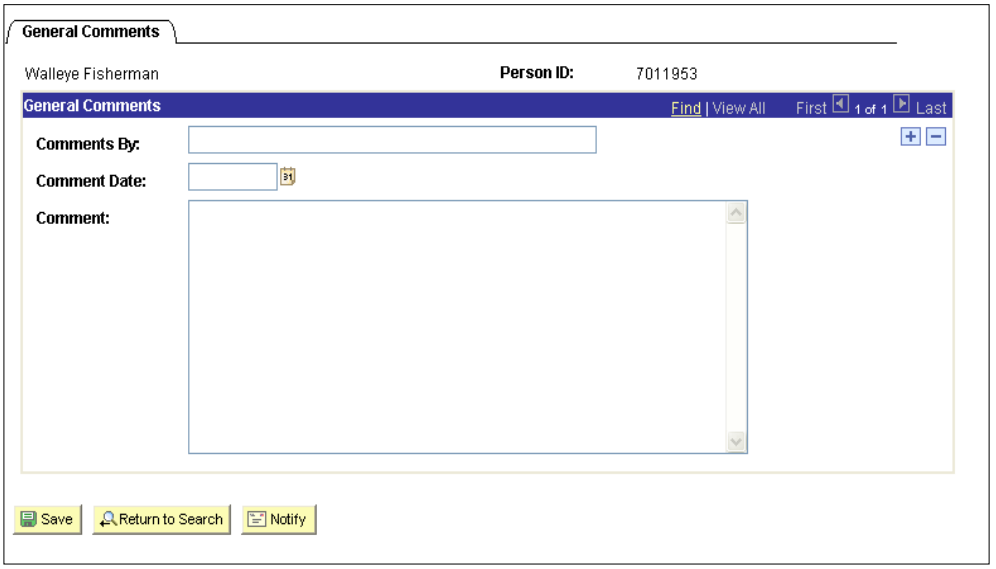


Click Save to save all Pay Rate Change information.

ADDING GENERAL COMMENTS

Use the **General Comments** page to enter miscellaneous comments about employees that are not incorporated in any other section of PeopleSoft Human Resources system.

Use the following navigation path to open the General Comments page: **Main Menu > Workforce Administration > Personal Information > Biographical > General Comments**. The search page will appear as described previously. Once you have selected the appropriate employee, the following page will appear.



The page pictured above depicts an employee who does not have any general comments entered for them. Therefore, you can begin entering data in the **Comments By**, **Comment Date**, and **Comment** fields. The **Comment** text field will hold up to 250 characters.

If you need to add a new row for comments (e.g. the Comment page is already filled out), click the + across from the **Comments By** field. This will create a new row below the existing comment.

Fill in the **Comments By**, **Comment Date**, and **Comment** fields and click on Save.

Note: Enter information that has been approved and is intended to become a part of the employee's permanent record.

JOB DATA ACTIONS

OVERVIEW

You will usually update job data by inserting new effective-dated rows into an existing employee record. Effective dates enable you to keep a complete chronological history of all your data and tables—whether you changed them years ago or want changes to go into effect months or years into the future. This enables you to analyze position data or employee records for particular periods of time.

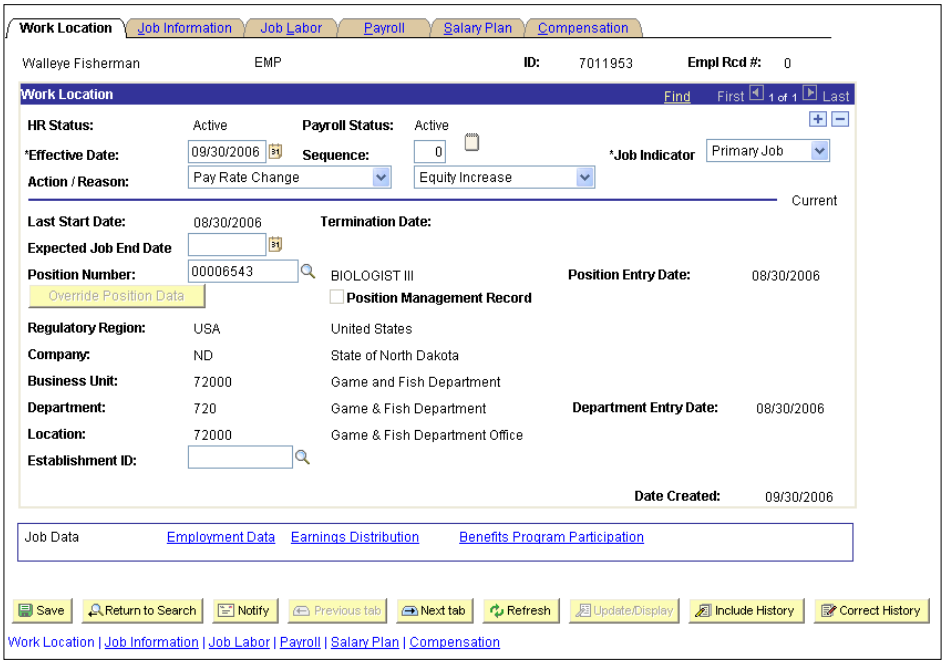
The system also uses effective dates to compare pages and tables to make sure that the prompt tables you see list only data that is valid as of the effective date of the page where you're working. For example, assume you create a new department code with an effective date of October 1, 2006. If you enter a new data row (or update an existing row) on the Job Data pages that have an effective date *before* October 1, 2006, you will not see the new code as a valid choice when you select a department because the new code has not yet taken effect.

When you enter a new data row, the system copies the contents of the previous row into the new row. This saves you the time of retyping information that stays the same. (Make sure you have the cursor on the data row you want to copy before you insert the new row.) The only new information you will see is the effective date, which defaults to the system date, which you can change if necessary.

YOU MUST ENTER AN ACTION and REASON FOR EACH ACTION ENTERED WITH THE APPROPRIATE SEQUENCE NUMBER. YOU CAN HAVE MORE THAN ONE ACTION PER EFFECTIVE DATE. FOR EXAMPLE: AN EMPLOYEE MAY BE RECLASSIFIED AND RECEIVE A PAY RATE CHANGE ON THE SAME EFFECTIVE DATE.

ACCESSING / CHANGING JOB DATA

To begin using the Job Data pages, use the following navigation path: **Main Menu > Workforce Administration > Job Information > Job Data**. The search page will appear as described previously. Once you have selected the appropriate employee, the following page will appear.



Insert a new data row by clicking the + sign across from the Payroll Status field. A new data row will appear above the original.

As stated earlier, the **Effective Date** field defaults to the current date.

The following Job Data scenarios begin with the assumption you have already selected the employee and inserted a new row.

ACTION 1: LEAVE OF ABSENCE (UNPAID LEAVE)

1. Enter the following in the **Action / Reason** fields: *Leave of Absence / Choose a reason.*
2. Click on Save.

The system will calculate the appropriate amount of pay.

Note: Leave of Absence (unpaid) is valid in the **Action / Reason** field only if the employee status is *Active*, *On Paid Leave*, on *Work Break*, or *Suspension*.

When the employee returns from leave:

1. Insert a row as described above.
2. Enter the effective date in the **Effective Date** field.
3. Enter the following in the **Action / Reason** fields: *RFL.*
4. Verify that the employee status is *Active*.
5. Investigate for job data changes due upon Return from Leave (i.e. service adjustment, etc.)
6. Click on Save.

ACTION 2: PAID LEAVE OF ABSENCE

1. Enter the following in the **Action / Reason** fields: *Paid Leave of Absence* (ADM, DEV, or MIL)
2. Click on Save.

To change the action to a leave of absence (unpaid) and extend the leave:

1. Insert another row as described previously.
2. Enter the effective date in the **Effective Date** field.
3. Enter the following in the **Action / Reason** fields: *Leave of Absence*
4. Click on Save.

To extend the leave for another reason:

1. Insert another row as described previously.
2. Enter the effective date in the **Effective Date** field.
3. Enter the following in the **Action / Reason** fields: *Data Change.*
4. Click on Save.

When the employee Returns from Leave:

1. Insert a row as described previously.
2. Enter the effective date in the **Effective Date** field.
3. Enter the following in the **Action / Reason** fields: *Return from Leave / RFL.*
4. Click on Save.
5. Verify that the employee status is *Active*.
6. Investigate for job data changes due upon Return from Leave (i.e. service adjustment, etc.)

ACTION 3: FMLA INTERMITTENT LEAVE

1. Enter the following in the **Action / Reason** fields: *Leave of Absence / FML*
2. Click on Save.

When the employee Returns from FMLA Intermittent Leave:

1. Insert a row as described above.
2. Enter the effective date in the **Effective Date** field.
3. Enter the following in the **Action / Reason** fields: *Data Change / RFL.*
4. Click on Save.
5. Verify the employee status is *Active*.

ACTION 4: RETURN FROM LEAVE

When the employee returns from leave:

1. Insert a row as described above.
2. Enter the effective date in the **Effective Date** field.
3. Enter the following in the **Action / Reason** fields: *Return from Leave / RFL.*
4. Click on Save.
5. Verify that the employee status is *Active*.
6. Investigate for job data changes due upon *Return from Leave* (i.e. service adjustment, step increase, contract increase, etc.)

ACTION 5: PROMOTION / DEMOTION WITH NO CHANGE IN SALARY

1. Insert new effective dated row.

Note: In addition to the assumptions stated earlier, this scenario assumes that all Position information for the position that the employee is promoted / demoted into has been verified / setup through Position Management. See the Managing Positions section of this manual for more information.

---

2. Verify that the **Job Indicator** field displays *Primary Job*.
3. Enter the following in the **Action / Reason** fields: *Promotion / <choose a reason>* for promotions and *Demotion / <choose a reason>* for demotions.

Note: The remaining steps are similar to the original hiring process as described in the Hiring portion of the manual.

---

4. Enter the position number in the **Position Number** field.
5. Verify that the following fields default to the correct information: **Position Entry Date**, **Department Entry Date**, **Company**, **Department**, and **Location**.
6. Click on the **Job Information** tab.
7. Verify that the following fields default the correct information: **Job Code** (and associated title), **Regular / Temporary**, **Full / Part** (full or part-time position), and **FLSA Status** (found by clicking on USA).
8. Click on the **Payroll** tab.
9. Enter the appropriate pay group in the **Pay Group** field.
10. Click on the **Salary Plan** tab.
11. Verify that the following fields default the correct information: **Salary Plan** and **Grade**.
12. Click on the **Compensation** tab and verify that salary does not change.
13. Click on the Benefits Program Participation hyperlink.
14. Verify information.
15. Click on Save.

ACTION 6: PROMOTION / DEMOTION WITH A CHANGE IN SALARY

1. Insert new effective dated row.

Note: In addition to the assumptions stated earlier, this scenario assumes that all Position information for the position that the employee is promoted / demoted into has been verified / setup through Position Management. See the Managing Positions section of this manual for more information.

---

2. Verify that the **Job Indicator** field displays *Primary Job*.
3. Enter the following in the **Action / Reason** fields: Pay Rate Change <*choose a reason*> promotion or reduction in pay for demotions.

Note: The remaining steps are similar to the original hiring process as described in the Hiring portion of the manual.

---

4. Enter the position number in the **Position Number** field.
5. Verify that the following fields default to the correct information: **Position Entry Date**, **Department Entry Date**, **Company**, **Department**, and **Location**.
6. Click on the **Job Information** tab.
7. Verify that the following fields default the correct information: **Job Code** (and associated title), **Regular / Temporary**, **Full / Part** (full or part-time position), and **FLSA Status** (found by clicking on

).
8. Click on the **Payroll** tab.
9. Enter the appropriate pay group in the **Pay Group** field.
10. Click on the **Salary Plan** tab.
11. Verify that the following fields default the correct information: **Salary Plan** and **Grade**.
12. Click on the **Compensation** tab.
13. Enter the rate code in the **Rate Code** field and the compensation rate in the **Comp Rate** field, click on **Calculate Compensation**.
14. Click on the Benefits Program Participation hyperlink.
15. Verify information.
16. Click on

.

ACTION 7: HIRE TEMPORARY AS A FULL TIME EMPLOYEE (NO BREAK IN SERVICE)

1. Enter the following in the **Action / Reason** fields: *Data Change* Choose a reason (ex. *Status Change*).
2. Enter the position number in the **Position Number** field.
3. Verify that the following fields default the correct information: **Position Entry Date**, **Department Entry Date**, **Company**, **Department**, and **Location**.
4. Click on the **Job Information** tab.
5. Verify that the following fields default the correct information: **Job Code** (and associated title), **Regular / Temporary**, **Full / Part** (full or part-time position), and **FLSA Status** (found by clicking on USA).
6. Click on the **Payroll** tab.
7. Enter the appropriate pay group in the **Pay Group** field.
8. Click on the **Salary Plan** tab.
9. Verify that the following fields default the correct information: **Salary Plan** and **Grade**.
10. Click on the **Compensation** tab.
11. Enter the rate code in the **Rate Code** field and the compensation rate in the **Comp Rate** field. Click on **Calculate Compensation**.
12. Click on the Employment Data hyperlink.
13. Click on the **Employment Dates** tab.
14. Enter / verify **Company Seniority Date** and **Benefits Service Date**.
15. Enter probation / provisional date (if applicable) in the **Probation Date** field.
16. Verify the information on the **Benefit Program Participation** hyperlink.
17. Click on Save.

ACTION 8: TRANSFERS

Note: This scenario assumes that you have already updated the position and have **not** chosen to Update Incumbents.

1. Enter the following in the **Action / Reason** fields: *Transfer* / *<choose a reason>.*
2. Enter the new position number in the **Position Number** field.
3. Click on the **Job Information** tab and verify information is correct.
4. Click on the **Payroll** tab.
5. Enter the appropriate information in the **Pay Group** field and verify the **Holiday Schedule** is correct.
6. Click on the **Salary Plan** tab and verify information is correct.
7. Click on the Employment Data hyperlink.
8. Click on the **Employment Dates** tab.
9. Enter probationary / provisional dates in the **Probation Date** field if applicable.
10. Click on Save to complete the transfer process.

ACTION 9: RETIREMENT / TERMINATION

1. Insert new effective dated row.
2. Enter the following in the **Action / Reason** fields: *Retirement* (or *Termination*) / *<choose a reason>*
3. Click on Save.
4. Verify that the employee status is *Retired / Terminated*.
5. Run the Benefit process.

ACTION 10: REHIRE

1. Insert new effective dated row.
2. Enter the following in the **Action / Reason** fields: *Rehire* / *Rehire*
3. Enter the position number in the **Position Number** field.
4. Verify that the following fields defaulted the correct information: **Position Entry Date**, **Department Entry Date**, **Company**, **Department**, and **Location**.
5. Click on the **Job Information** tab.
6. Verify that the following fields default the correct information: **Job Code** (and associated title), **Regular / Temporary**, **Full / Part** (full or part-time position), and **FLSA Status** (found by clicking on USA).
7. Click on the **Payroll** tab.
8. Enter the appropriate pay group in the **Pay Group** field.
9. Click on the **Salary Plan** tab.
10. Verify that the following fields default the correct information: **Salary Plan** and **Grade**.
11. Click on the **Compensation** tab.
12. Enter the rate code in the **Rate Code** field and the compensation rate in the **Comp Rate** field. Click on **Calculate Compensation**.
13. Click on the Employment Data hyperlink.
14. Enter (as appropriate) the probationary / provisional date in the **Probation Date** field.
15. Enter or verify **Company Seniority Date** and **Benefits Service Date** based on the type of rehire (reinstatement or reemployment).
16. Verify the information on the **Benefit Program Participation** hyperlink.
17. Click on Save.

VIEWING SUMMARY INFORMATION

OVERVIEW

At times, you will want to take a quick look at information summarizing the history of an employee with your organization. PeopleSoft Human Resources features a variety of pages that summarize employee data you have entered in other pages throughout the system.

Note: All of the PeopleSoft pages that are accessed in this section of the training manual are display only pages. No data can be entered or modified.

OBJECTIVES

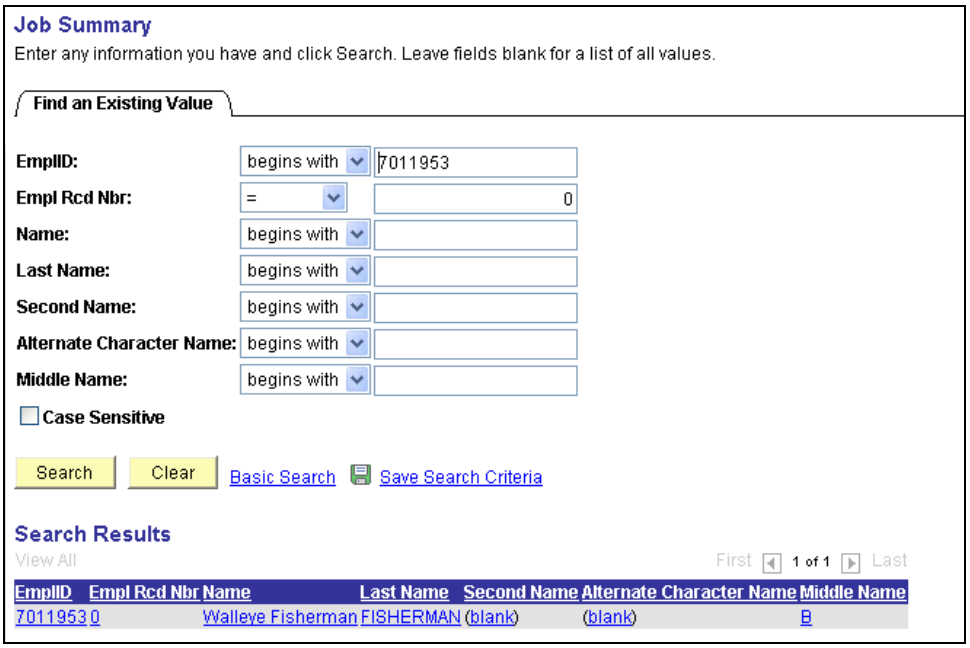
At the completion of this section, you will be able to:

1. View employee job and compensation history.
2. Locate employees by Social Security Number.

JOB SUMMARY

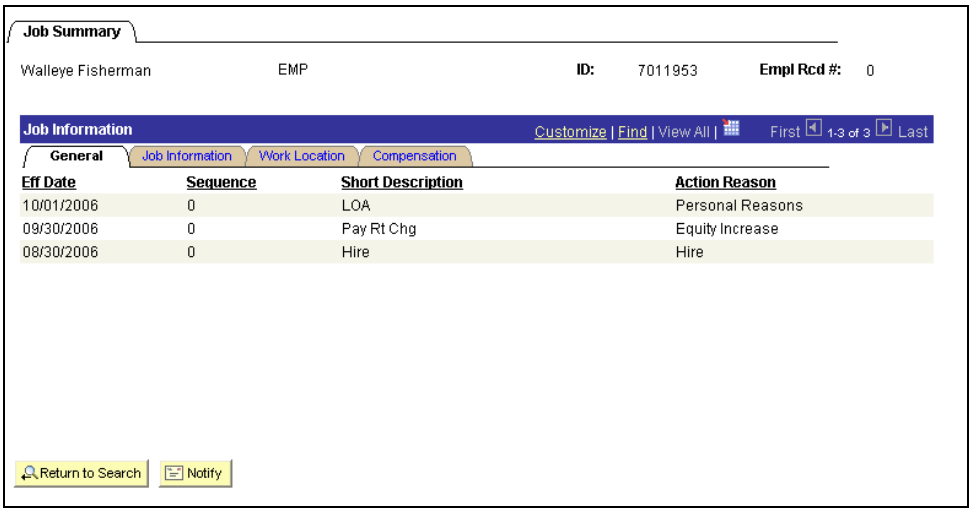
Use the Job Summary page to obtain an overview of an employee's job history with your organization. You will see all the administrative actions implemented for this employee. Such actions might include pay rate changes, disciplinary actions, leave of absences, promotions, or transfers. In essence, the information on this page is a summary of any changes entered in the Job Data pages.

Click on **Main Menu > Workforce Administration > Job Information > Review Job Information > Job Summary** navigation path and the following page will appear.



Enter the **Employee ID or LastName** in the search criteria box.
Click on the Search button.

The **Job Summary** page will appear.



There are four different pages within Job Summary. They are the **General**, **Job Information**, **Work Location**, and **Compensation** pages.

The following fields are displayed on the **General** page.

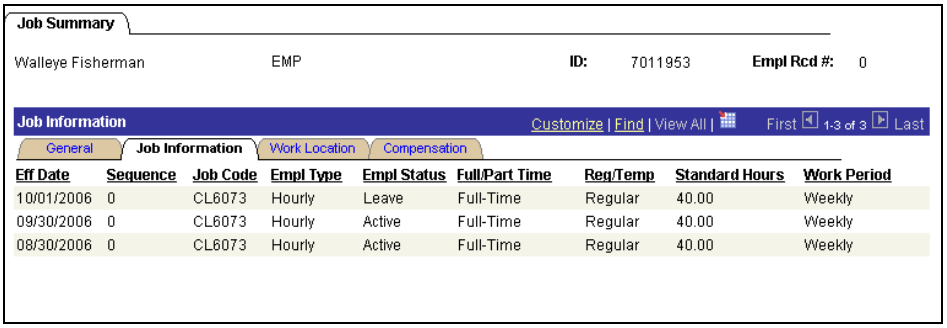
Effective Date – Indicates when the action took effect.

Sequence – Tracks actions that occur in the same day.

Short Description – Describes what action took place.

Action Reason – Provides rationale for the action.

Click on the **Job Information** tab to display the following page.



The following fields are displayed on the **Job Information** page:

Effective Date – Indicates when the action took effect.

Sequence – Tracks actions that occur in the same day.

Jobcode – Describes the job the employee held after each personnel action.

Empl Type – Describes whether the employee was hourly, salary, etc. after each personnel action.

Empl Status – Indicates whether the employee was *Active***,** *Terminated, Retired, etc.,* after each personnel action.

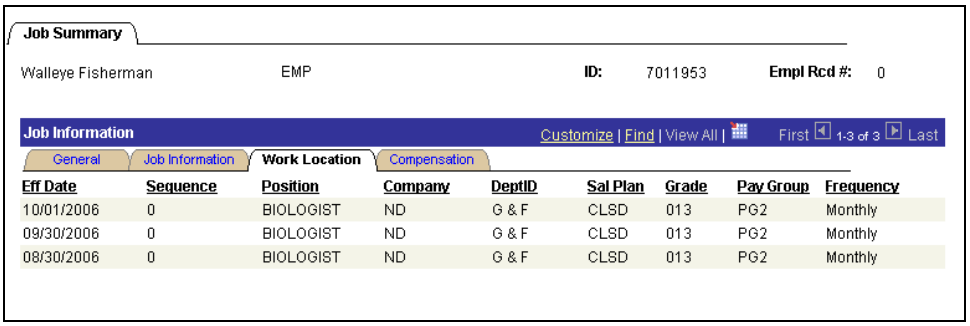
Full / Part Time – Indicates whether the employee was a *Full* or *Part Time* employee after each personnel action.

Reg / Temp - Indicates whether the employee was a *Regular* or *Temporary* employee after each personnel action.

Standard Hours – Indicates the standard number of hours per week the employee worked after each personnel action.

Work Period – Identifies the time period for the Standard Hours after each personnel action.

Click on the **Work Location** tab to display the following page.



The following fields are displayed on the **Work Location** page:

Effective Date – Same as previous page.

Sequence – Same as previous page.

Position – Identifies the Position the employee held after each personnel action.

Company - Identifies the organization the employee belonged to after each personnel action was taken. This will display *ND* for State of North Dakota active employees.

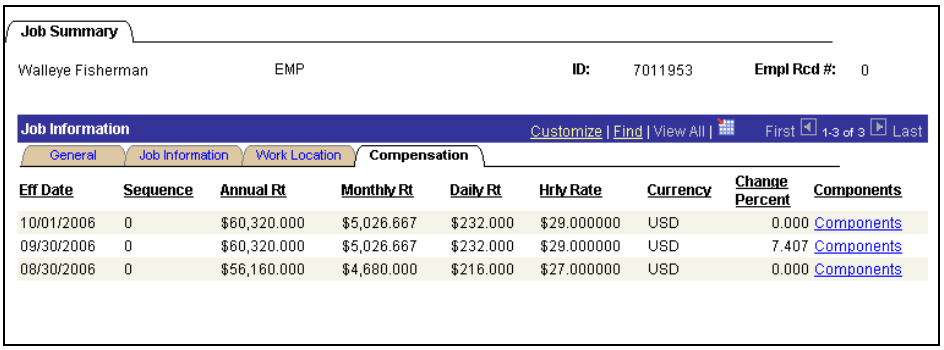
DeptID - Identifies the department the employee belonged to after each personnel action was taken.

Sal Plan and **Grade** – Indicates the salary plan and salary grade the employee was in after each personnel action was taken.

Pay Group – Identifies the pay group the employee belonged to after each personnel action was taken.

Frequency – Indicates the pay frequency (e.g. Monthly) for the employee after each personnel action.

Click on the **Compensation** tab to display the following page.



Eff Date	Sequence	Annual Rt	Monthly Rt	Daily Rt	Hrly Rate	Currency	Change Percent	Components
10/01/2006	0	$60,320.000	$5,026.667	$232.000	$29.000000	USD	0.000	Components
09/30/2006	0	$60,320.000	$5,026.667	$232.000	$29.000000	USD	7.407	Components
08/30/2006	0	$56,160.000	$4,680.000	$216.000	$27.000000	USD	0.000	Components

The following fields are displayed on the **Compensation** page.

Effective Date – Same as previous page.

Sequence – Same as previous page.

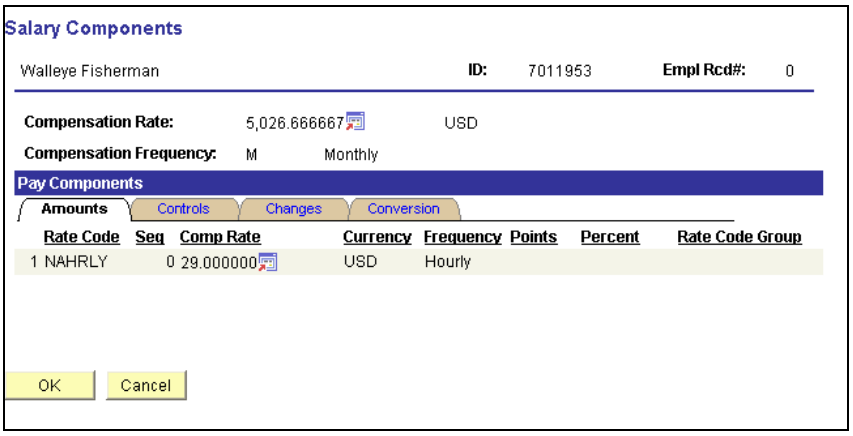
Annual Rt, Monthly Rt, Daily Rt, & **Hrly Rt** – Indicates the compensation rates for the employee after each personnel action.

Currency – This will always be US dollars (*USD*).

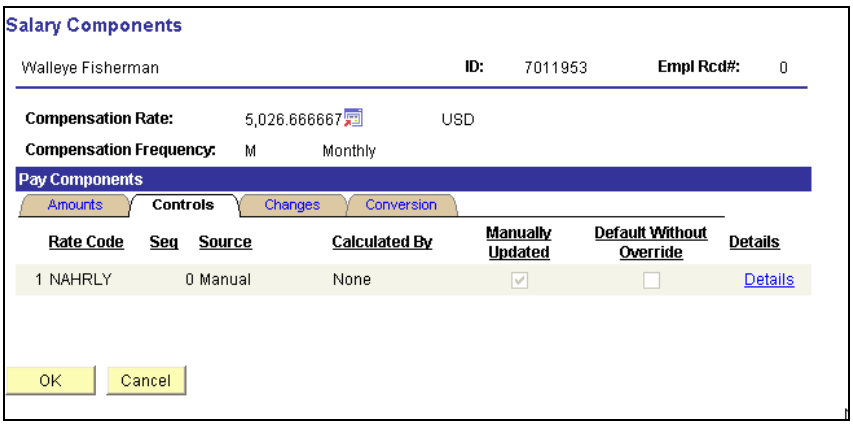
Change Percent – The percent change in compensation after each personnel action.

Components – Each personnel action has a hyperlink to a compensation components page. The compensation page shows the detail pay components such as rate code (e.g. *NAANNL*, *NAHRLY*, or *MTHLY*), compensation rate, and change amounts. Examples of components pages are listed below.

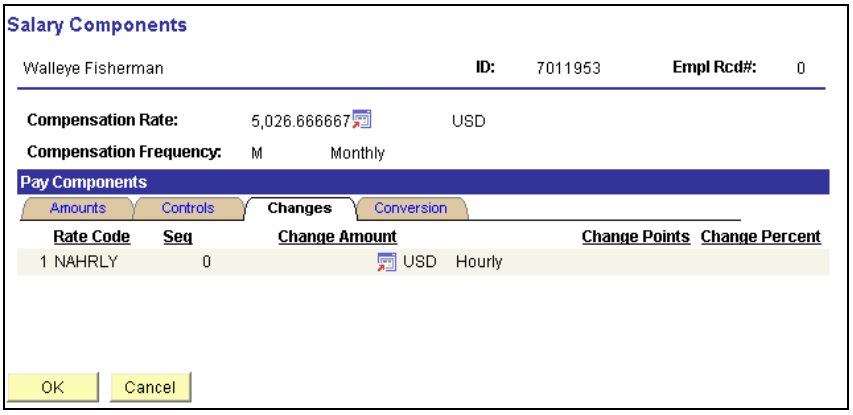
EXAMPLE COMPONENTS PAGE – AMOUNTS TAB



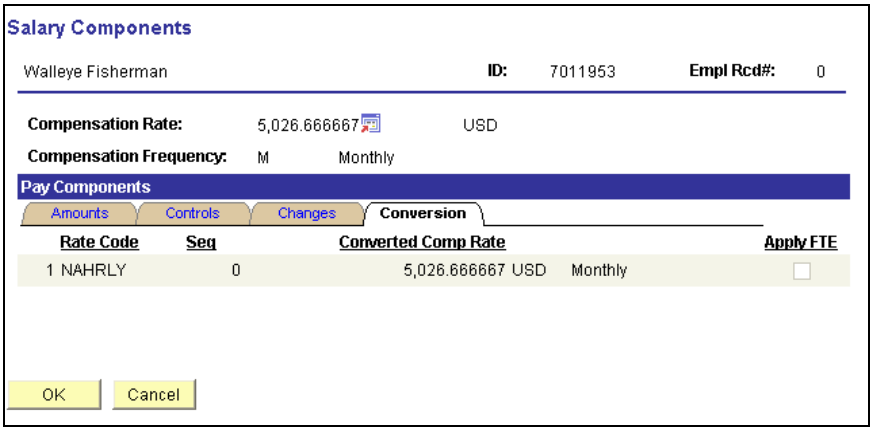
EXAMPLE COMPONENTS PAGE – CONTROLS PAGE



EXAMPLE COMPONENTS PAGE – CHANGES TAB



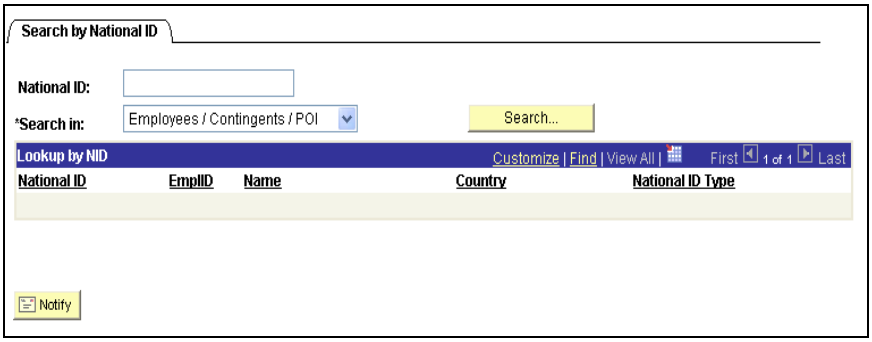
EXAMPLE COMPONENTS PAGE – CONVERSION TAB



SEARCH BY NATIONAL ID

Use the Search by National Id pages to locate a person's employee ID number using their Social Security Number. Once you find the person's employee ID, you can use it when you move to other Search pages.

Click on the following navigational path **Main Menu > Workforce Administration > Personal Information > Biographical > Search by National ID** and the following page will appear.



Enter the employees Social Security Number in the **National ID** field (no punctuation is required) and click Search....

PeopleSoft then displays the employee's name, employee ID, Country, and National ID Type (e.g. Social Security Number).

You can now use the employee ID for other Search pages.

HUMAN RESOURCES REPORTING

OVERVIEW

This section describes how to run and view Human Resources reports through the process monitor and report manager.

OBJECTIVES

After completing this section, you will be able to:

1. Run Reports.
2. Review Reports through the Process Monitor.
3. Review Reports through the Report Manager.

RUNNING STANDARD REPORTS

In this section, the general procedure for running the standard reports that come with your PeopleSoft applications is covered. If you (or someone in your organization) have added custom reports to the system, the procedure should be similar to the one described.

The following sections briefly introduce you to the fundamentals of submitting, monitoring, and viewing reports. The following topics will be covered:

- Requesting Reports in PeopleSoft Applications
- Running Reports using the Process Scheduler
- Checking the Status of a Report
- Viewing Report Results

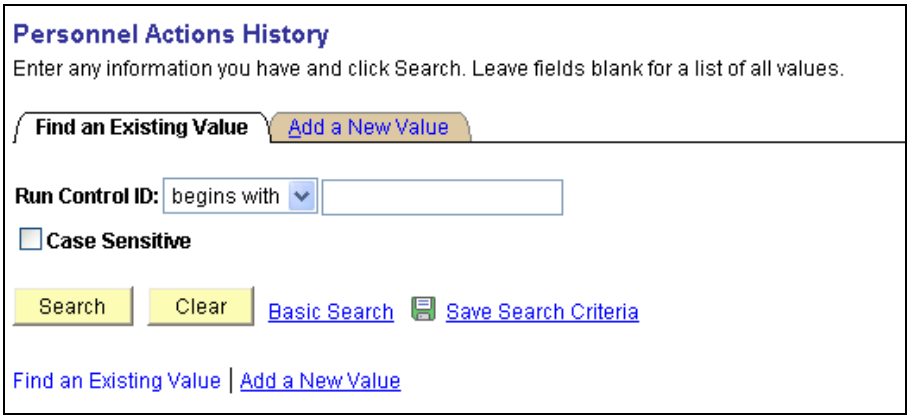
Note: The procedure described in this chapter applies to most standard reports, but not all of them. Some PeopleSoft applications include reports that you run from outside the system, using PS/nVision or a third-party application. The documentation for your application tells you which application to use.

REQUESTING REPORTS IN PEOPLESOFT APPLICATIONS

To begin the reporting process, use the following navigational path: **Main Menu > Workforce Administration > Job Information > Reports > Personnel Actions History**. Most of the reports that will be run by agencies are at the following navigation: **Main Menu > ND State Applications > Reports.**

The Report Menu List will display several delivered reports that are available through PeopleSoft. For our example we are going to use the Personnel Actions History report.

When you select a report from a menu, you will be prompted for a **Run Control ID**. Each run control you create receives a unique Run Control ID. You may use any value for a Run Control ID. If there is not a predefined Run Control ID, you can create one by clicking on the Add a New Value hyperlink.

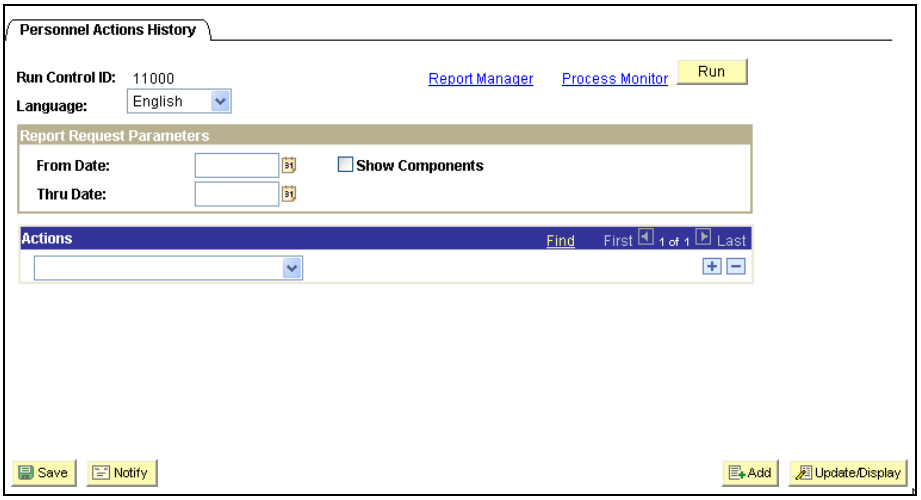


Click on the Add a New Value hyperlink and enter a value for your **Run Control ID**. This value can be used as often as you like. Click the Add button.

You are now ready to run your report through the Process Scheduler.

RUNNING REPORTS USING THE PROCESS SCHEDULER

The following page will appear after you have added your Run Control ID.



Follow the directions below to run your report on the process scheduler.

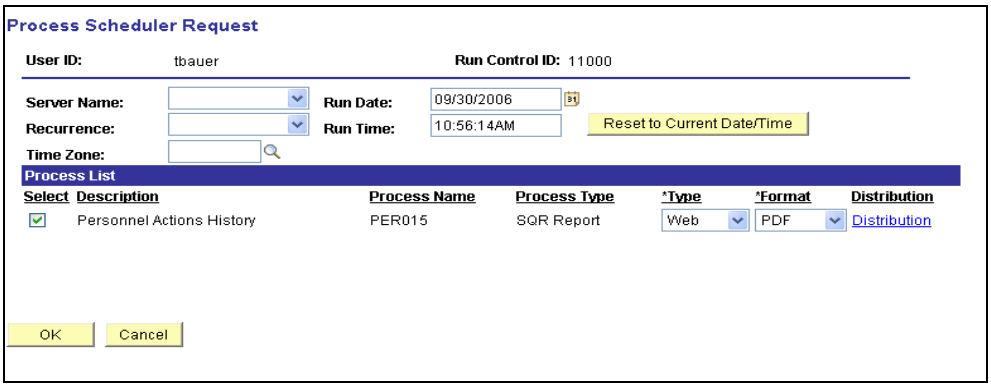
1. Fill in any parameters that are being requested. The ones used for this report are as follows:

   Language – *English*
   From Date – *January 1, 2006*
   End Date – *Current Date*
   Actions – *Hire*

   This will produce a report of all employees hired during the 2006 calendar year.

2. Click on the Run button.

The **Process Scheduler Request** page will appear:



3. Enter *PSNT* in the **Server Name** field. This is where your process is going to run.

4. The **Type** and **Format** fields will default to the values set for the delivered report. These values can be changed from this page. *Web* and *PDF* are the most commonly used values.

5. Click the OK button to continue, or the Cancel button to cancel the process.

6. The word *Processing* will appear in the top right-hand corner while processing. The word *Save* will briefly appear when done.

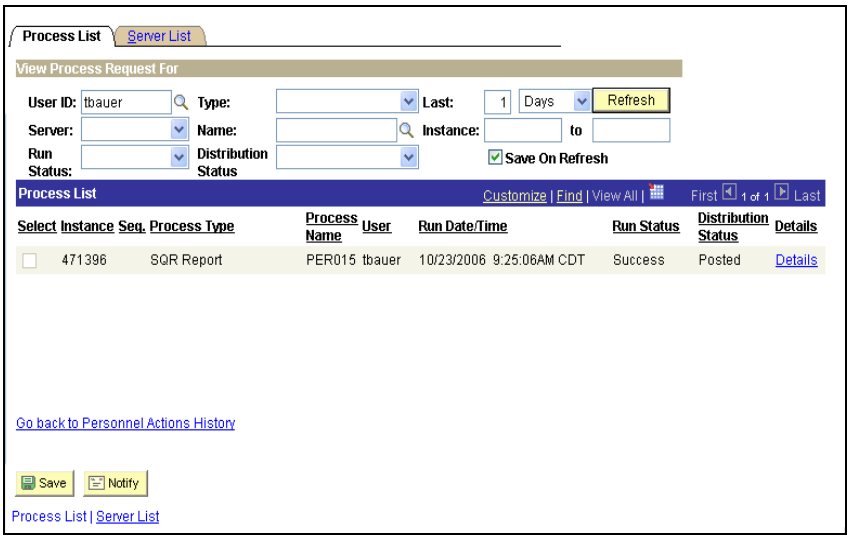
You are now ready to check the status of your report.

CHECKING THE STATUS OF A REPORT

After you click the OK button on the previous page, you will return to the page listed below.

Click on the Process Monitor hyperlink. This will take you to the **Process List** page. The Process List page will display the Instance Seq, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status and Details.

Instance Sequence	The order that your request is being processed.
Process Type	The process type that is being requested. Examples: SQR Report, Crystal, COBOL, Application Engine.
Process Name	The technical name for the report.
User	The User ID running the report.
Run Date/Time	The Date and Time of processed.
Run Status	The status of the report: Queued, Initiated, Processing, Posted, Success.
Distribution Status	When the Trace/Message Log is available.
Details	Link to view run logs and report results.



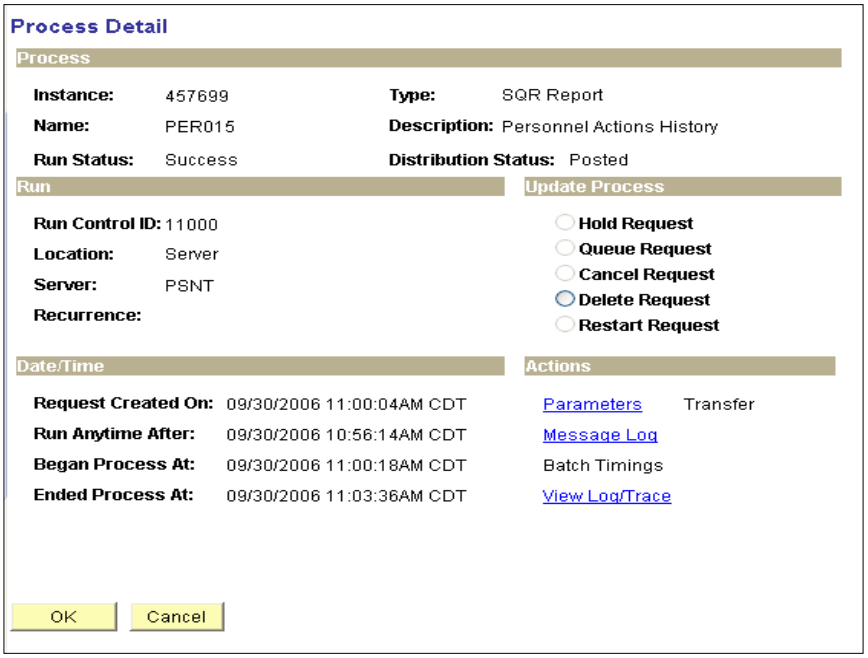
Queued	Report is waiting to start processing.
Initiated	Report has begun processing.
Processing	Report is processing.
Posted	Report is posted in the Report Manager.
Success	Report has completed successfully.
Error	Report did not complete successfully.

Depending on how much data you ask the system to retrieve, and depending on the system's current processing load, your report might take only a few moments or considerably longer to run, therefore you may not always see all of the processing stages.

Your user ID appears in the **User** field. You can use the navigation arrows on the screen to scroll through the list. Use the **Server, Type, Run Status, Last,** and **Instance** list boxes to limit the processes that Process Monitor displays.

Click Refresh to update this page with the latest system activity. If the **Run Status** column says *Initiated* or *Processing*, the report is still running. When it says *Success*, the system has finished running the report.

After you have received a run status of *Success* and a Distribution Status of *Posted*, click on the Details hyperlink and the following page will appear:



From this page you can view the Parameters that you requested your process from, any message logs and the actual report results.

VIEWING REPORT RESULTS

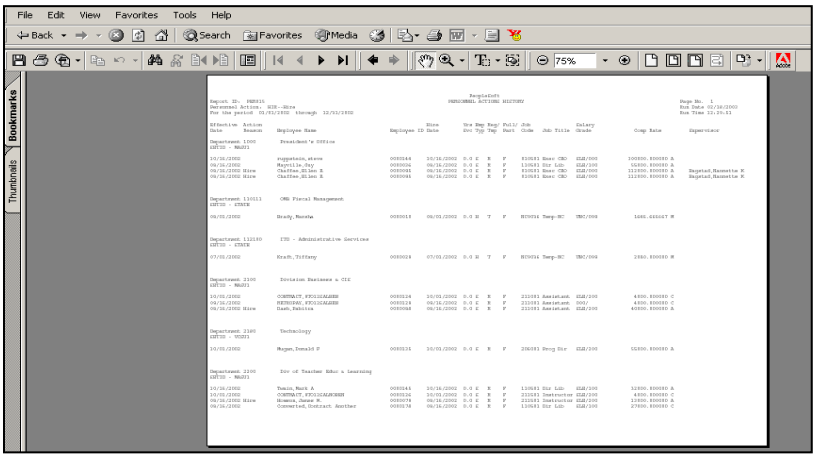
The following instructions will allow you to view the results of your report.

1. Click on the View Log/Trace hyperlink and the **Report Log Viewer** page will appear.

2. Click on the **.PDF** file to view your report. To view file with the .PDF format you must have Adobe Acrobat Reader loaded on your system.

Note: The PER015 – is the Process Name that we requested earlier. The Message Log will display error messages for runs that were not successful. The Trace File is used by technical staff.

COMMONLY USED ACROBAT BUTTONS



	Save to a file
	Send report to the printer
	Zoom In for larger view
	Zoom out for small view
	Navigate through pages
	Page actual size
	Page fit in window

VIEWING PREVIOUS REPORTS

To check the status of your report, or view previously ran reports, you can navigate to: ***PeopleTools > Process Scheduler > Process Monitor.*** Change the number of days to how many days you need to go back and hit **Refresh**, all reports ran for that time period will show up.

CANCELING OR HOLDING REPORT REQUESTS

Depending on the status of your report, you can cancel it or put it on hold. If the system is done processing a report, you can delete its information from Process Monitor. Click **Details** to display the options for canceling or holding a request.

EMAILING THE REPORT

Choose type of *Email* and *HTM* when you are initially running the report.

Note: If you are entering a list of email addresses, make sure to use a ***semicolon*** to separate each address from the others.

You can add users or roles to the distribution by adding a row and filling in the pertinent information. You can also use this page to add someone who would not normally have the proper Setting Report Distribution. The **Distribution Detail** page allows you to choose the recipients of your process output. To set up distribution for your process output, click on the **Distribution** hyperlink.

If the process that you are running allows output that can be emailed, you can enter an email subject and message and send the output to a group of email addresses with security to view this output.

Note: You can add users or roles to the distribution by adding a row and filling in the pertinent information. You can also use this page to add someone who would not normally have the proper security to view this output.

You can also run the report as a .PDF file and email it. The formatting on the .PDF file is much easier to read.

WORKING WITH QUERY

VIEWING AN EXISTING QUERY

Navigate:
Main Menu > Reporting Tools > Query > Query Viewer

Click on the **'Search'** button for a list of available queries if you do not know the name of the query you are going to run. You can also narrow your search by enter the first few letters.

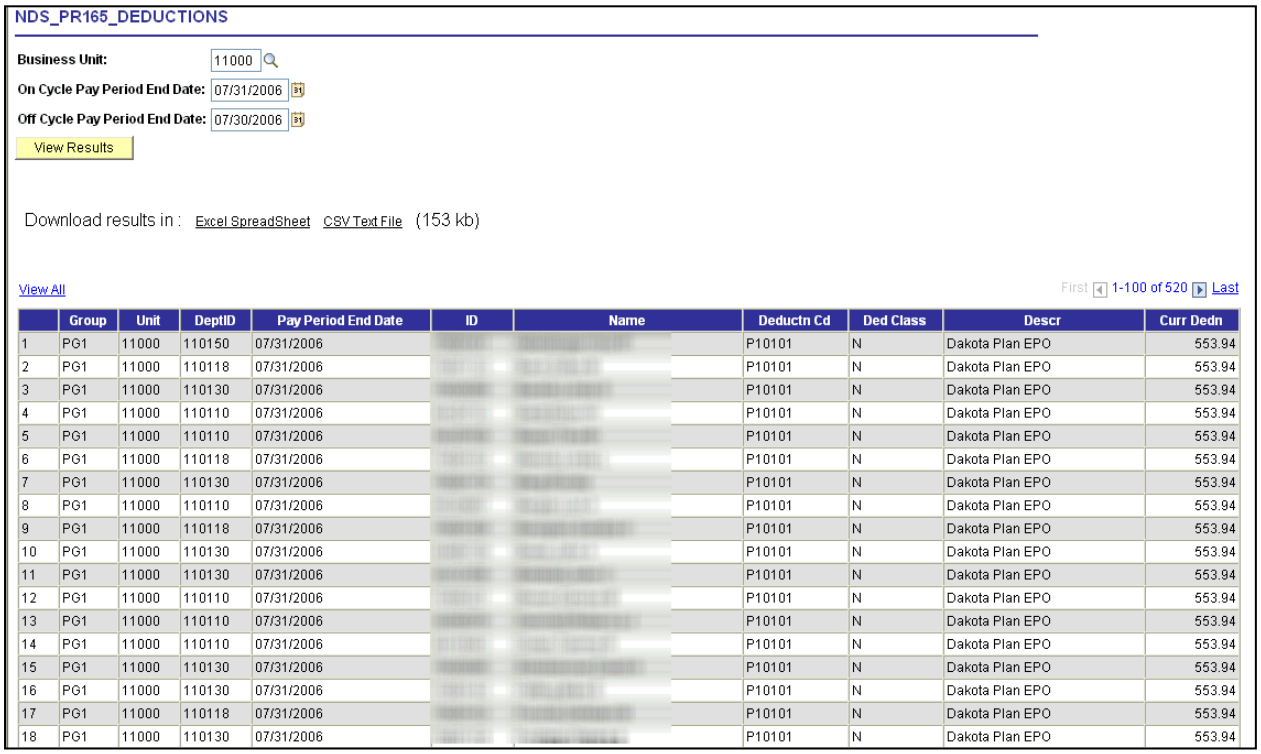
The query name will appear in the 'Search Results' as shown below:

Note: You can also enter the name of the Query in the search box.

You may click on the 'HTML' link to show the results of the query on your screen. If you would like the query results to appear in a spreadsheet click on the 'Excel' link.

The following screen shows the results for clicking on 'HTML'.

Some queries will have prompt boxes that must be completed before the query will run successfully. After you have completed all of the prompt fields, click on 'View Results'.



NDS_PR165_DEDUCTIONS

Business Unit: 11000

On Cycle Pay Period End Date: 07/31/2006

Off Cycle Pay Period End Date: 07/30/2006

View Results

Download results in : Excel SpreadSheet CSV Text File (153 kb)

View All First 1-100 of 520 Last

	Group	Unit	DeptID	Pay Period End Date	ID	Name	Deductn Cd	Ded Class	Descr	Curr Dedn
1	PG1	11000	110150	07/31/2006			P10101	N	Dakota Plan EPO	553.94
2	PG1	11000	110118	07/31/2006			P10101	N	Dakota Plan EPO	553.94
3	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94
4	PG1	11000	110110	07/31/2006			P10101	N	Dakota Plan EPO	553.94
5	PG1	11000	110110	07/31/2006			P10101	N	Dakota Plan EPO	553.94
6	PG1	11000	110118	07/31/2006			P10101	N	Dakota Plan EPO	553.94
7	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94
8	PG1	11000	110110	07/31/2006			P10101	N	Dakota Plan EPO	553.94
9	PG1	11000	110118	07/31/2006			P10101	N	Dakota Plan EPO	553.94
10	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94
11	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94
12	PG1	11000	110110	07/31/2006			P10101	N	Dakota Plan EPO	553.94
13	PG1	11000	110110	07/31/2006			P10101	N	Dakota Plan EPO	553.94
14	PG1	11000	110110	07/31/2006			P10101	N	Dakota Plan EPO	553.94
15	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94
16	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94
17	PG1	11000	110118	07/31/2006			P10101	N	Dakota Plan EPO	553.94
18	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94

Note: If once you view the results of the query you would prefer to see the results in an Excel Spreadsheet, you may click on the link 'Excel Spreadsheet' to do this.